

CHARACTERISTICS AND MOTIVATIONAL FACTORS OF MAJOR DONORS  
TO BOWLING GREEN STATE UNIVERSITY

Marcia Sloan Latta

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Committee:

Patrick D. Pauken, Advisor

Carolyn J. Palmer,  
Graduate Faculty Representative

Rachel A. Reinhart

Ernest Savage

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## ABSTRACT

Patrick D. Pauken, Advisor

With declining state support, increased financial need on the part of the fastest growing demographic sections of the population, and public policy that discourages major increases in tuition for public higher education, the only logical source of additional finances for public colleges and universities is increased private funding through philanthropic contributions. The purpose of the present study was to examine what motivated individuals to make major gifts of \$25,000 or more to the Bowling Green State University (BGSU) Building Dreams Centennial Campaign, and to identify the characteristics of these donors. Data were collected from the Building Dreams Campaign Survey, which was sent to all 310 individuals who gave \$25,000 or more. A total of 58% of those contacted responded to the survey. The survey solicited feedback on the size of the campaign gift, motivations for making the gift, and demographic data such as household income, geographic location of home, whether or not the individual was an alumnus, length of time he or she had been a donor to BGSU, gender, and age. To determine whether each participant had served on a volunteer board at BGSU, and if so, which one(s), information was obtained through the Office of Alumni and Development database, which is the database of record for university board service.

The first research question asked: Does the amount of the major gift differ by age, geographic region, and gender? The results showed that there is a significant difference by age, with donors in the 70-79 years of age category giving the most, and also by gender, with men giving more than women. There was not a statistical significance in giving by geographic region. The second research question asked: Does the amount of major gift differ by the presence of motivational factors? Respondents were given 20 different possible motivational factors and

were allowed to choose as many of them as they wished. Only one of these factors was significantly related to the amount of the gift. The factor of Being Asked was negatively related to the amount of the gift. Research question three asked: Does serving on a voluntary board at the university impact the amount of gift? The results showed that there was a positive relationship between serving on a board and the size of gift, and that those who served on the Board of Trustees or Foundation Board gave significantly more than those who served on other boards at the institution. The fourth research question asked which motivational factors and demographic variables best predict the amount of gift. The variables entered into the equation were Income, Leaving a Legacy, Age, Identification with a Project, and Board Participation. Income accounted for the greatest amount of variance in the amount of giving.

Findings from the study can assist university administrators, development professionals and researchers interested in philanthropic giving obtain a better understanding of the characteristics and motivations of potential major donors. Ultimately, this knowledge can better utilize both human and financial resources in development offices in higher education, by helping development officers to identify and develop relationships with potential donors, determine which individuals to consider for board service, and ultimately, asking them for donations.

I dedicate this dissertation to my loving husband, Bob, and my two wonderful daughters, Elizabeth and Maria. Throughout this process you have been wonderfully supportive, encouraging, and understanding. Thank you for your patience and love.

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## CHAPTER 1: INTRODUCTION

With the increasing demands of a rapidly-changing global economy, the need for higher education in American society has never been greater than it is today. In order for a worker to achieve middle class economic status, and to maintain employability, post-secondary education is increasingly a necessity. Further, if the United States wishes to remain economically competitive in the world, it must educate citizens to be able to think creatively while at the same time dramatically increasing knowledge in the so-called “STEM” areas (science, technology, engineering and math), which are critically important in a knowledge and technological society (Friedman, 2006). For the past several decades, countries such as Russia, India, Brazil and China have outpaced the U.S. in the number of scientists, engineers, and mathematicians who have graduated from their universities. Consistently, schoolchildren from those countries and other industrialized European and Asian nations have surpassed American schoolchildren on standardized tests (Friedman, 2006). The population of the U.S. continues to grow – increasing from 226,545,805 people in 1980, to now over 305,529,000 people – with the highest birthrates among immigrant and low-income populations (U.S. Census Bureau, 2009). The agricultural and manufacturing bases that for the past two centuries provided most Americans with a source of ever-growing income have been minimalized or moved abroad to countries where labor is less expensive.

At the same time, due to multiple factors including an increase in healthcare and incarceration costs and a decrease in tax revenues due to the recession of 2008 (U.S. Office of Management and Budget website, 2009), government aid for higher education is declining as a percentage of support throughout the country. The overall cost of a college education has consistently outpaced inflation for the past two decades, and for the past five years, “the inflation-adjusted cost of attending a public university has climbed 35 percent, one of the largest

increases on record” (Mantel, 2008, p. 282). Meanwhile, the need for an educated workforce has never been greater (Strauss, 2008).

### Background of the Problem

A perfect storm is brewing. The need for an educated populace is a must in order to maintain competitiveness in a global economy, the costs of a college education are escalating, and the highest growth rate of potential students come from the most economically-disadvantaged homes. Consumer debt has reached an all-time high (Mantel, 2008, p. 274), and the college student loan program is facing unprecedented funding challenges, which will undoubtedly make securing loans more difficult for most financially-challenged students and their families (Cho & Glod, 2008). This situation has the potential of further impacting who has access to college and impacts public policy on multiple fronts including government lending practices, government-sponsored grants for higher education, societal impact with the widening gap between the “haves” and “have-nots” in society—particularly among racial and ethnic underserved populations—and determining the long-term competitiveness of the U.S. in the global economy.

There are significant demographic shifts occurring in the U.S. today that have relevant impact on both higher education enrollment and society as a whole. Government aid for higher education is declining as a percentage of support throughout the country (Okunade & Berl, 1997). Other current trends for 18-24 year-olds (traditional college-age) show that fewer than half of low-income Americans pursue higher education; two-thirds of middle-income Americans attend college in pursuit of a bachelor’s degree; 80% of high-income Americans pursue college; 40% of Black and Hispanic freshmen earn a bachelor’s degree within six years; 60% of white students earn a bachelor’s degree within six years; 64% of Asian-American freshmen earn a

bachelor's degree within six years; the number of adult learners (frequently single parents) continues to rise; and there is a growing disparity between the rich and poor segments of society (Lederman, 2007).

Currently, the highest birthrates are among immigrant (primarily Hispanic and Asian) and low-income populations. There is a double-digit rise in the proportion of minority students – especially Hispanic students – and minority undergraduate enrollment is expected to rise from 30% of the total college population to 37% in 2015. These same subpopulations, if they attend college, have higher financial need and are frequently less able to obtain loans (Strauss, 2008).

Other trends affecting higher education include the rapid rise of for-profit four-year institutions, the rise of online education, and the mergers and closures of colleges (Chabotar, 2006). Colleges in the northeast and Midwest are most at risk for the latter issue, due to the combination of higher costs, pending decrease in the number of traditional-age students in these regions of the country, and inadequate endowments to provide operating and scholarship support (Chabotar, 2006).

The recession of 2008-09 and the financial credit crisis have had a negative impact on low and middle income families' ability to secure low-interest loan rates for college. These events have also had an impact on the college enrollment process, particularly among non-elite private and public universities (Craver, 2008). States in the Midwest are among those hardest hit with the current economic woes; and combined with the shifting demography financial constraints may exacerbate and accelerate declining enrollment and mergers and closings of institutions. In Ohio, the state share of instruction has shown a steady decline, decreasing from 67 percent of the costs in 1977-78, to 52 percent in 1992-93, to 29 percent in 2007-08 (Bowling Green State University Treasurer's Office Financial Report). These trends are important to

consider when examining the role of private support in higher education, which increasingly occurs through a private giving comprehensive campaign.

With declining state support, increased financial need from the fastest growing demographic sections of the population, and public policy which negates major increases in tuition for public higher education, the only logical solution is increased private funding through philanthropic contributions. Public higher education is receiving fewer government funds as a percentage of government support, and private fundraising efforts are increasingly important. Yet, there are few empirical studies of major donor campaign giving published in academic journals, and most of the studies that are published in social science and education journals focus on elite liberal arts colleges (Okunade & Berl, 1997, p. 202).

Gifts from alumni and other supporters at public universities typically provide funding for scholarships, faculty development funds, and increasingly, for bricks and mortar. With government funding for higher education stagnant or in decline, a global economy increasing the need for an educated workforce, and demographic changes in the U.S. with a rise in immigrant and low income families (Friedman, 2006), universities need to better understand what motivates donors to give large philanthropic gifts in the hope of retaining these donors, and upgrading them to ever larger givers (Marudas & Jacobs, 2004) as well as attracting new donors to the cause. Private gifts are increasingly the way universities fund programs that once were funded through state or federal support, and successful fund raising programs are key in determining which institutions become the most powerful colleges and universities in the country. Private funding increasingly determines which programs survive or are cut and what size of scholarships are offered, which determine in part who applies to an institution and which faculty are recruited or retained (Elliott, 2006, p. 6).

Charitable giving in the United States totaled \$307.65 billion in 2008, an overall decline of 5.7% (adjusted for inflation) in comparison to 2007. While overall giving was down, giving to higher education rose 2.3% during that same time to \$31.6 billion, although the top 20 higher education institutions, led by Stanford University, raised 26.6% of the total estimated giving to higher education (Giving USA, 2009, pp. 1, 97). Giving to public universities was just under \$13.2 billion in 2008 (Voluntary Support of Education, 2009, 08/2), a dramatic increase from the \$356 million raised in 1972 when private giving to public universities was first recorded (Worth, 2002, p. 32). Although the overall amount of private gifts to higher education has increased, the percent of alumni giving has actually slightly decreased in recent years in both participation (a decline from 11.9 to 11.7%) and in total dollars by 1.5% (Giving USA, 2008, p. 104). Learning who is likely to give, and what motivates them to give can assist colleges and universities in providing scholarship assistance to students, as well as helping to finance laboratories, buildings, and other needs on a college campus. As James Duderstadt, former president of University of Michigan explained, there are four primary areas of revenue available for a state university which he refers to as “a four-legged stool”: tuition and fees, federal support for research, state support, and privately funded endowments and gifts (Duderstadt, in Rhodes, 1997).

### The Purpose of the Study

The Bowling Green State University Foundation completed its first major comprehensive campaign, the Building Dreams Centennial Campaign for Bowling Green State University, in December 2008. This causal-comparative study sought to determine what motivates individuals to become major donors to a public university. The campaign was very successful in exceeding its fundraising goal of \$120 million by raising a total of \$146.5 million. The campaign also involved 36,000 new donors to BGSU. In total, 310 individuals and 115 corporations and



foundations each gave in excess of \$25,000 – the threshold amount necessary to be considered a major donor at BGSU (BGSU Foundation, Inc. Annual Report, 2009). The 310 individual donors were invited to complete the Building Dreams Campaign Major Donor Survey in March 2009. Surveys were sent via e-mail to those donors for whom the BGSU Foundation had good e-mail addresses, and via U.S. mail for all others.

The purpose of this study was to examine motivational factors in relation to the amount of gift size for the Building Dreams Centennial Campaign. The study can assist in developing predictive modeling to determine which individuals are most likely to make future major gifts, and can guide foundation management in determining which donor prospects staff members should visit and ultimately solicit for funds. Prior to this study, there was no empirical study that showed what factors influenced BGSU's major donors in their decisions to make a gift to the university.

The composition of alumni and other individual donors at state universities, such as BGSU, is different from those at many elite institutions. BGSU, an institution of approximately 20,000 students, has 37% first-generation college students. The average loan debt for recent graduates exceeds \$25,000 (BGSU Institutional Research website), and the university's proactive development office is relatively young (30 years) in comparison to many private institutions and larger, public land-grant research universities. The study used secondary data based on a confidential questionnaire from the BGSU Office of Alumni and Development with 34 questions. The dependent variable was the major gift amount, which is quantitative, and was measured according to the size of the gift recorded on the pledge forms. The independent variables were the motivating factors, which included belief in the mission of the university, the feelings toward the administrative leadership (president, dean, athletic director, or other

administrative leader), obligation to give back to alma mater, desire to help students, desire to help faculty, service on a voluntary board, and visits or solicitations from a development officer. The independent variables were categorical and dichotomous as participants checked all motivational factors that applied. The sample included all individuals who made a gift of \$25,000 or more during the campaign (310 people). Other independent variables included age, geographic region, gender, and prior involvement on a BGSU advisory or governing board. Each of these variables is categorical.

### Research Questions

This study sought to address the following research questions:

- 1) Does the amount of the major gift differ by age, geographic region, and gender?
- 2) Does the amount of major gift differ by the presence of motivational factors?
- 3) Does serving on a voluntary board at the university impact the amount of gift?
- 4) Which motivational factors and demographic variables best predict the amount of the gift?

### Significance of Study

By administering a quantitative study of the major gift donors to the Building Dreams Centennial Campaign, the results will be beneficial to the BGSU Foundation, and potentially to other public universities, in planning and executing future campaigns. It will also have the potential to impact staff efficiencies in the BGSU Foundation Office by utilizing data mining techniques to ascertain which alumni and friends have similar profile characteristics to the Building Dreams Campaign major donors and deploying major gift officers to meet with those individuals. This has the potential ability to shorten the typical donor prospecting time period due to more accurate donor identification, leading to a condensed major gift solicitation time

period which can be very beneficial to universities and their foundations in times of dwindling financial resources.

The survey also gave insight into what motivates alumni, employees, and other stakeholders into making sizable gifts to public higher education. Aside from financial capacity, it gave insight into other motivating factors that influence giving, including if a prior history of giving to the institution influenced the decision to make a major gift, if serving in a volunteer leadership capacity, such as being on a university board, impacted giving. This has implications for who is invited to serve on advisory and governing boards within the university. Other questions included the following: Do tax consequences play a role in a decision to make a gift? What impact does the view of university administrators or faculty members, or the role of the development officer have with donors? Are gifts made simply because the donor wishes to help students or faculty?

The purpose of the study was to determine what motivating factors and characteristics predicted amounts of major philanthropic gifts of \$25,000 or more to the BGSU Building Dreams Centennial Campaign.

#### Definition of Terms

The following terms were used in this study:

*Advancement*: The unit or division on campus charged with the responsibilities of alumni relations, development or fund-raising, the marketing and communications efforts related to those constituencies, and often, the non-profit foundation responsible for managing the funds.

*Alumn(a),(us),(i)*: Upon graduation from an institution, a graduate becomes an alumnus (male), an alumna (female), or multiple graduates of both genders become alumni (plural).

*Annual Gift Donor:* A donor who contributes a gift on an annual basis, typically a small amount (often in the range of \$25-\$1,000) to an unrestricted fund.

*BGSU Foundation, Inc.:* The BGSU Foundation Inc. is a 501(c)(3) tax-exempt not-for-profit organization certified by the Internal Revenue Service. It is BGSU's entity for receiving privately-funded gifts to benefit the university, investing the funds, and distributing them according to the donor's wishes. The BGSU Foundation, Inc. is governed by a 33-member national board of directors.

*Case for Support:* The written prospectus that outlines the need for private giving to accomplish what the institution hopes to achieve with the desired funds.

*Comprehensive Fundraising Campaign:* A concerted, organized effort to raise private funds for multiple identified projects within the institution; often the term is interchangeable with "capital campaign."

*Development:* The process that encompasses the giving cycle of a donor, from identification and involvement, to gift solicitation, closure, and stewardship of the gift.

*Donor Prospect:* An individual who is considered likely to make a gift, but has not yet done so.

*Major Gift Donors:* The BGSU Foundation considers individuals who commit to a gift of \$25,000 or more to be a major gift donor; \$25,000 is the minimum level required to establish an endowed account.

*Motivation:* Motivation is the ability to pursue a goal for personal achievement; the persistence to complete what one has started (Hayes, 2007).

*Motivational Factors:* The items that cause people to take action in pursuit of something.

*Philanthropic Giving:* Making a financial gift to help others.

*Voluntary Boards of Service:* The university has several different boards whose members are invited to serve for multi-year terms with no monetary compensation. Boards included in this study are as follows:

*Alumni Board of Directors:* This 25-member board is made up completely of alumni from throughout the nation who serve a four-year term of service. They oversee the activities on and off campus of the Alumni Association.

*Board of Trustees:* This nine-member board is appointed by the governor of the State of Ohio, for a term of service of nine years. This is the governing board of BGSU with ultimate responsibility. Members must be residents of the State of Ohio.

*College Advocate Boards:* Each college has an Advocates Board, whose board members' responsibilities include sharing their professional expertise, making philanthropic gifts, identifying opportunities for student internships, and advocating for the particular college within campus and externally. Terms of service for board members are three years, with an additional three year renewal term.

*Falcon Club Advisory Board:* This board assists the Athletic Department in fundraising and encouraging attendance at campus sporting events.

*Firelands Development Board:* This board serves to assist Firelands College, BGSU's branch campus located near Huron, Ohio, in raising private financial support.

*Foundation Board of Directors:* This 33-member board is comprised of both alumni and non-alumni from throughout the nation who are appointed to a three-year term with an option of renewing for an additional three-year period. Members have a fiduciary responsibility to oversee and invest all philanthropic funds that are contributed to the BGSU

Foundation, Inc., a 501 (c)(3) organization. Members are expected to make an annual financial contribution and to encourage others to do so.

### Delimitations and Limitations

One delimitation of this study was the restriction of collecting data from only one Midwestern state university. By design, this study only examined major gift donors from one Midwestern public higher education institution (Bowling Green State University) and from one comprehensive campaign (Building Dreams Centennial Campaign). As such, the generalizability of the study may be limited. The results may be different than those from a small, private institution, from a flagship state university, or from a higher education institution in a different region of the country. Also, they may differ from an institution that has specialized community outreach services, such as a hospital, where an individual may be motivated to give based on past care one has received.

This study relied in part on self-reporting by donors; reliability of self-reporting may sometimes be questioned, as respondents may misinterpret the question, or may be unaware of their subconscious motivations for giving.

### Organization of the Study

This study was organized as follows: Chapter 1 includes the introduction, purpose of the study, research questions, significance of the study, design of study, definition of terms, limitations and delimitations, and the organizational summary of the study. Chapter 2 reviews the literature on philanthropic giving to higher education, the historic development of the campaign, and donor motivation. Chapter 3 explains the research methodology used including the data collection. Chapter 4 describes the study's results and provides an analysis of the data.

Chapter 5 summarizes the major findings of the study and includes recommendations for future research.

## CHAPTER 2: LITERATURE REVIEW

This chapter presents a review of the literature related to philanthropic fundraising in higher education to establish an understanding of the literature as it relates to the research problem. Although there have been some substantial contributions to the field during the past quarter century, empirical literature on major donor motivation to public higher education remains limited. Indeed, until 1985 when Indiana University founded the Center on Philanthropy, no college or university offered a course, or even a unit on philanthropy in general (Fisher, 1989), let alone a course devoted to philanthropic giving to higher education. Due to the increasing demand for private funds among non-profit organizations, there is an active movement to professionalize advancement with degree programs in philanthropy and non-profit management now offered at several universities throughout the country (Elliott, 2006). Although there has been progress, scholarly research in the field is still a relatively young phenomenon. The literature review is divided into three sections: the history of philanthropic fund raising in higher education, the advent of the fundraising campaign, and the research literature on donor motivation.

### The History of Philanthropy in Higher Education

While it is frequently thought that higher education philanthropy started in the American colonies, the tradition actually began in ancient Greece, when the Athenian philanthropist Cimon built the Academy of Socrates and Plato (Brittingham & Pezzullo, 1990; Cook & Lasher, 1996; Fisher, 1989). The Greeks also provided the word most associated with giving to benefit others – philanthropy – which means “love of mankind” (Elliot, 2006, p. 30). While it is true that philanthropy is deeply ingrained as a tradition in the United States, philanthropy itself is an ancient practice aligned with most of the major religions of the world (Wagner, 2004). The



Greeks viewed philanthropy as a component of good citizenship and humanitarian inclinations to help the public at large (Elliot, 2006, p. 30). Alexander the Great gave the funds to build a vast library in Egypt during the fourth century, B.C., and is also reported to have financed the Lyceum of Aristotle (Cook & Lasher, 1996).

As Fisher (1989) states, philanthropy is in consonance with a university's mission: A university by whatever name exists for mankind, and its primary functions are to pursue truth, to interpret that truth gently with tentativeness and humility, and to create and appreciate beauty. Fundraising is a crucial dimension of philanthropy and educational fundraisers are completely engaged in the spirit and business and joy of philanthropy. (p. 18)

Literature does not seem to mention philanthropic involvement in the academy again until the founding of the medieval universities in Europe in the twelfth century, when college founders sought to secure funding from wealthy merchants and others of the ruling class to cover the resources necessary to build the universities (Cook & Lasher, 1996). Once built, charitable gifts continued to be sought during the Middle Ages, often with a religious motivation, in particular at the universities in Paris, Oxford, and Cambridge, where members of the nobility established endowments for individual colleges (Cook & Lasher, 1996).

The concept of philanthropic giving to higher education took root early in the American colonies, in the 17th century. Church and government leaders in the colonies wished to begin colleges modeled on those in Europe that would educate learned leaders to advance Christianity and civilization in the colonial wilderness, as well as serve as training grounds for the professions (Curti & Nash, 1965; Rudolph, 1962).

Fundraising for higher education, through both subscriptions and bequests, was conducted in earnest in the early 1630s by church leaders, including John Eliot, a member of the Massachusetts Bay Colony and a missionary to the Indians. A commonly held belief at the time was that God had bestowed the good fortunes the wealthy enjoyed, and therefore, they had a duty to support good works to society. Eliot, among others, actively pursued funds for the new small college of Congregationalists in Newtowne in Massachusetts Bay (Curti & Nash, 1965), primarily by writing to wealthy Englishmen.

It is not known who, if anyone, solicited an estate gift to the college from John Harvard, the son of a family of London butchers. Harvard received two degrees from Cambridge University before settling in Charlestown, Massachusetts Bay. It is not even certain that Harvard ever visited the new college in Newtowne, but when he died on September 14, 1638, he had bequeathed half his estate, along with his personal library of about 300 books, to the college. A year later, his name was conferred on the college, setting a precedent for other early colleges in the New World. While Harvard's gift gave the college an initial burst of life, financial difficulties soon followed, causing students to withdraw and by the early 1640s, instruction was suspended (Curti & Nash, 1965).

The new president of Harvard College, Henry Dunster, and the General Court decided that the best possible way to secure additional funds to stabilize the financial status of the college was to, once again, secure resources from mother country England, as Eliot had done. Three men – Thomas Weld, Hugh Peter, and William Hibbins – were chosen as agents for the college to “raise what funds they could without engaging in dishonorable begging” (Curti & Nash, 1965, p. 6). In addition to making a profitable trip to London to meet with potential donors, the fundraising agents, along with Harvard President Dunster, wrote a promotional tract titled, *New*

*England's First Fruits* (Brittingham & Pezzullo, p. 6; Curti & Nash, 1965, p. 7), serving as the first of thousands of written fundraising case statements in American higher education. The tract described the Christian mission of the college, its curriculum, and the difference it would make in New England.

Harvard College set the fundraising precedent for other colleges that were founded in the New World, and its example of organizing a fundraising drive in the mother country to wealthy individuals who shared the same religious faith as the college, was widely copied (Cook & Lasher, 1996; Fisher, 1989). Ministers, trustees, and presidents of the newly found colleges all played leadership roles in seeking philanthropic support to assist the colleges in paying their bills, and also for purposes such as scholarships and professorships. For example, an early scholarship fund was endowed with a gift of one hundred pounds by a Lady Mowlson of England, who was visited by Weld, and created the endowment at Harvard for “some poor scholler” through the Master of Arts degree (Curti & Nash, 1965, p. 7).

In addition to Harvard, many of America's first universities were re-named in honor of gifts from early benefactors, among them: Elihu Yale gave a modest shipment of goods from England to Connecticut's then Collegiate School; Nicholas Brown gave \$160,000 to the College of Rhode Island; Henry Rutgers gave \$5,000 and a bell to then Queens College; Charles Tufts gave land; and Waterville College was named for Gardner Colby after he bailed it out of financial difficulty (Brittingham & Pezzullo, p. 7).

Benjamin Franklin was an early fundraiser for the Philadelphia Academy – which grew into the University of Pennsylvania – carefully preparing a list of those he would call on. As he advised a Reverend Tennent, who sought his advice on fundraising:

In the first place, I advise you to apply to all those whom you know will give something; next, to those whom you are uncertain whether they will give anything or not, and show them the list of those who have given; and lastly, do not neglect those whom you are sure will give nothing, for in some of them you may be mistaken. (Cutlip, 1965, p. 6)

Fundraising for colleges and universities continued in much the same manner throughout the nineteenth century, primarily through sponsoring religious affiliations that would seek donations for the college to help spread the denomination's religious values (Brittingham & Pezzullo, 1990) and presidents and trustees occasionally seeking bequests or high-level gifts from wealthy individuals. One major change that did occur during this time period, which continues today, was the organizing of alumni for annual fund drives (Worth & Asp, 1994). While records of alumni giving date back to the 17th century, the earliest organized alumni fund drive occurred at Yale in 1890, with just under 400 alumni giving a total of \$11,000 (Brittingham & Pezzullo, p. 8).

### The Advent of the Campaign

The early years of the 20th century saw significant changes in philanthropic giving with the advent of the fundraising campaign. New techniques and principles of fundraising were developed by two executives of the Young Men's Christian Association (YMCA) named Charles Sumner Ward and Lyman L. Pierce (Cutlip, 1965).

The late 19th and early 20th centuries in the United States saw a dramatic growth in the number of voluntary organizations founded to assist with community and social problems brought on by the industrial revolution, immigration, and high growth rates in cities. Among the many organizations founded during this period were the Boy Scouts, Girl Scouts, Campfire Girls, American Cancer Society, National Association for the Advancement of Colored People,

National Urban League, and the National Tuberculosis Association, among many others (Cutlip, 1965, p. 38). The YMCA movement was growing quickly in major cities during this time period as well. All of these civic and charitable organizations needed money to carry out their missions, and wealthy business owners such as John D. Rockefeller, Sr., along with many others, began to urge that “this business of benevolence” be more efficiently organized (Cutlip, 1965, p. 38).

The YMCA’s Ward and Pierce, both of whom had successfully raised funds for various YMCAs, primarily throughout the Midwest, joined forces in 1905 to raise funds on a special building campaign in Washington, DC. Pierce had launched the building effort in 1902, but by 1905 it had stalled, and an enhanced initiative was needed to reach the goal. He asked the YMCA national leadership to send him Ward, who was already a successful executive and noted fundraiser for the YMCA. Their method – which set off a movement of similar types of campaigns – was a very focused effort with a specific goal, utilizing numerous volunteers, divided into teams, who would then recruit others to ask for funds for the institution. There was a kickoff dinner, much fanfare and a publicity drive with local media, a campaign “clock” to countdown the time left and show the amount raised each day, and the financial involvement of business and civic leaders competing with one another on the amounts raised for the cause (Cutlip, 1965; Worth & Asp, 1994).

The campaign method also relied on lining up a few very large gifts first before having the volunteer teams engage in their fundraising. The effort was successful, quickly copied, and became the model used for numerous non-profit organizations throughout the country. The success of the campaign method also led to the creation of a new aspect of fundraising – the professional consultant, ultimately impacting the structure of fundraising at universities as well as other non-profits (Worth & Asp, 1994). In fact, through 1990, each of the five largest

fundraising consulting firms in the United States had their origins from the YMCA and the first fundraising consulting firm founded by Ward (Brittingham & Pezzullo, 1990, p. 12).

Campaigns using the same methodology were launched during World War I with the American Red Cross setting a new record in fundraising by raising over \$114 million to support European war relief in eight days. The first United Fund Drive raised over \$203 million in 15 days just as armistice was approaching, shattering all previous fundraising campaign results (Brittingham & Pezzullo, 1990, p. 12). It was clear that this method of fundraising was successful, not only in raising dollars, but also raising awareness of the institution or cause and generating publicity for that as well. Through the involvement of a large number of volunteers, prospective board members could also be identified.

#### The Inception of the Higher Education Fundraising Campaign

After raising funds through organized campaigns for several other YMCAs following the Washington, D.C. effort, Ward was hired in 1914 by the University of Pittsburgh to conduct a campaign for \$3 million. This was the first higher education fundraising campaign to be conducted using the same methods as had been used for the YMCAs and the other non-profits (Cutlip, 1965; Worth & Asp, 1994). Ward recruited several other individuals to work on the Pittsburgh campaign, among them Arnaud Marts, Carlton Ketchum, and George Ketchum. Following the success of the Pittsburgh campaign, each began consulting careers to colleges, universities, and other non-profits on setting up fundraising campaigns and today, their legacies continue through the fundraising consulting firms they founded.

Simultaneous to the Pierce and Ward fundraising campaign for the Washington, DC YMCA, Bishop William Lawrence, an Episcopal clergyman and descendent of two distinguished New England families, became president of the Harvard Alumni Association. Through his

service as priest of St. John's Memorial Chapel in Cambridge, MA, Lawrence was in frequent contact with Harvard's president, Dr. Charles Eliot, and many faculty members. He became convinced of the need to increase their salaries, and in Lawrence's inaugural address as president of the alumni association, he challenged Harvard alumni to give \$2.5 million to increase the salaries of the liberal arts faculty. Lawrence recruited two other alumni to assist in organizing an intentionally low-key effort consisting of letters to the 10,000 alumni, and a few editorials and articles that they could have placed in newspapers. The effort concluded with \$2.4 million raised – the largest fundraising effort undertaken by Harvard at that time (Cutlip, 1965, pp. 51-52). It also created a new standard inasmuch as the funds raised went toward salary enhancement, not for buildings, scholarships or libraries, for which the majority of previous higher education gifts had been designated.

The higher education fundraising campaign boom had begun, and in a short period of time, colleges and universities throughout the country were embarking on campaigns. In 1923, fundraising consultant John Price Jones sent a questionnaire regarding fundraising campaigns to 150 colleges and universities. Of the 109 responses he received, 64 had embarked on a fundraising campaign since the end of World War I (Curti & Nash, 1965, p. 205). These were all private universities. While some had special assistants to the president whose responsibilities included fundraising tasks, most of the colleges and universities engaged a consultant who would come to campus to manage the campaign, working closely with the trustees and president to organize a volunteer group of alumni and community leaders to raise funds for a specific purpose such as a new building or scholarship campaign throughout a specified period of time (Curti & Nash, 1965).

In the process of developing effective fundraising campaigns and learning how certain donors substantially increase their gifts, a pyramid of giving is often used to describe an evolutionary giving process (see Figure 1, located at the end of this section of the chapter). As the commitment to the mission of the organization increases, typically so does the amount of money a donor is willing to give to the cause, resulting in a narrowing of the top of the pyramid. As Worth (1993) noted, the base of the pyramid is made up of the entire prospective donor constituency. In higher education, these are the individuals the university believes may have an interest in making a philanthropic gift, such as alumni, parents of current and former students, faculty and staff, and season ticket holders to athletic and arts events. Corporations and foundations that may reside in the region or who benefit from the institution would also be included.

The next level is made up of those who give to the organization, typically a lower level monetary gift to the annual fund (often through a direct mail or telefund appeal, or through attendance at special events where a portion of the ticket cost is a charitable contribution toward a special program or project). For many donors, the annual fund is where their giving will begin and ultimately end, depending on interest and involvement with the organization, financial ability, and philanthropic motivation. Annual fund gifts are most often solicited without face-to-face contact.

As a donor becomes more philanthropically involved with the organization, the donor may choose to become a major gift donor (exact monetary levels for each section of the pyramid vary according to the organization, but typically, a major gift is a minimum of a mid five-figure or low-six-figure gift). These gifts make up much of the resources for building projects and for endowed funds. While a much smaller percent of individuals give major gifts than annual fund

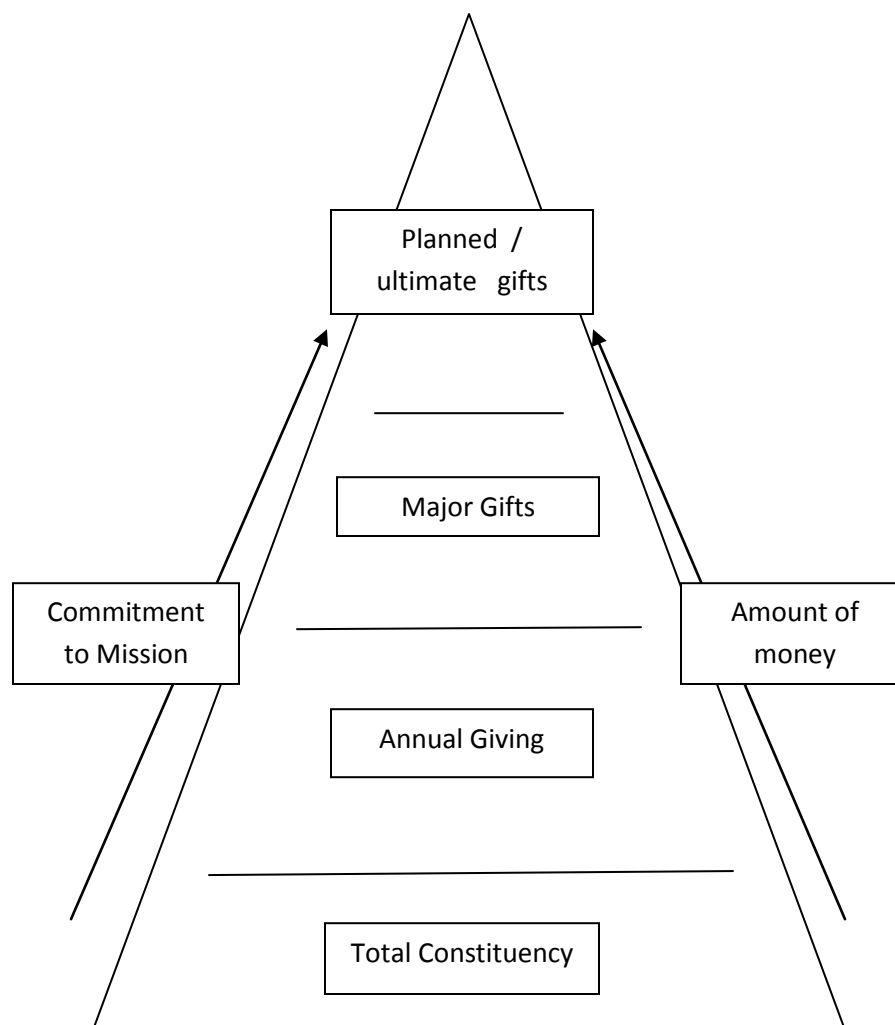


gifts, major gifts account for the majority of funds raised during a campaign (Lasater, 2006). Major gifts typically require a period of time known as “cultivation,” where a development professional or volunteer meet with the prospective donor on several occasions to learn of the donor’s interests and ascertain the right philanthropic project and amount to match a need of the institution’s with the donor’s interests.

At the top of the pyramid are the planned, or ultimate gifts. These gifts, while a very small percentage of the overall donor population, are very significant to the organization and often have the ability to transform a program, department, or even the university as a whole (Worth, 1993). Donors at this level of the pyramid have made very sizable “stretch gifts” either through estate provisions for the organization, or through a major gift of a very high level.

Successful fundraising campaigns have well developed pyramids of giving with prospects and donors at each level of the pyramid. As donors move through the various levels, the number of donors shrinks, while the financial amount of the gift increases dramatically. A frequent adage among development professionals is that “90 percent of the dollars comes from 10 percent of the donors” (Worth, 1993, p. 12).

Figure 1. Pyramid of Giving (Worth, 1993, p. 10).



### Fundraising in the Modern University

A momentous occasion for fundraising in higher education occurred at a conference held in 1958 at the Greenbrier Hotel in White Sulphur Springs, West Virginia. Underwritten by the Ford Foundation, and co-sponsored by the American Alumni Council and the American College Public Relations Association, the purpose of the three-day meeting was to discuss how to most effectively organize fundraising into the modern university, resulting in more funds raised to advance the mission of higher education (Cook & Lasher, 1996; Worth, 2002). More than 70

presidents, trustees, business leaders, fundraising consultants, public relations, alumni, and development professionals attended the three-day meeting which resulted in the “Greenbrier Report.” The report recommended that the functions of alumni relations, fundraising (development), and public relations be integrated into a unit of institutional advancement, overseen by a vice president who would report directly to the president and be a part of the administrative cabinet (Cook & Lasher, 1996).

At the time of the conference, a survey indicated that only 20 percent of the institutions participating in the conference had one individual who was responsible for coordinating the three functions and was reporting directly to the president (Leslie, 1969). At some colleges and universities, advancement duties were successfully being conducted at college or unit levels due to engaged deans, but without overall coordination throughout the campus. The conference laid the groundwork for the higher education advancement office. It also resulted in the eventual merger of AAC and ACPRA in 1974 to create the Council for the Advancement and Support of Education (CASE), for professionals in the institutional advancement specialties (Worth, 2002, p. 30). With a professional organization dedicated to providing systematic training for advancement professionals, colleges and universities no longer needed to engage outside consultants to come to campus to periodically run a special fundraising effort, but instead could hire their own in-house development professionals to develop long-term relationships with donors whose funding could enhance academic programs and other areas on campus such as libraries, athletics and museums.

Nearly 30 years after the Greenbrier Conference, CASE sponsored the Colloquium on Professionalism in Institutional Advancement, also known as Greenbrier II, in 1985. One of the major discussion points of the Colloquium was the need for more scientific research in the

advancement field. The “report urged studies in three hierarchical categories: 1) theory-building studies, which produce general principles about the function; 2) introspective studies, which provide knowledge about the occupation and its practitioners; and 3) administrative studies, which help a specific organization solve a problem” (Kelly, in Worth, 2002, p. 42).

Since that time, there has been marked progress in research of the advancement field, and there are now four scholarly journals that are peer-reviewed. Simultaneously, there has been a dramatic increase in the number of graduate-level courses and degree programs regarding philanthropic giving and non-profit management. In 1990, only 17 colleges and universities offered a graduate degree program with a concentration in non-profit organization management. A decade later, more than 97 colleges and universities had such a program (Kelly, in Worth, 2002, p. 42). The Center on Philanthropy at Indiana University was founded in 1987 specifically to provide research on this fast-growing segment of society (Elliott, 2006, p. 31). While such courses and degree programs are broader than higher education fundraising, many of the principles of fundraising and non-profit management are applicable to higher education advancement work as well.

### Fundraising in Public Higher Education

Historically, state universities were primarily funded through legislative appropriations with a portion of their funds coming from tuition charged to the students (Elliott, 2006). With a few exceptions—most notably Cornell University, the University of Michigan, and Indiana University—most public universities did not begin to organize fundraising operations until around 1975 (Cook & Lasher, 1996, p. 34). One exception was the University of Kansas, where the Kansas University Endowment Association was founded in 1891, to receive gifts from individuals in support of the university (Worth, 2002, p. 31). Perhaps because state universities

were frequently the first higher education institutions founded in the Midwestern states, they had considerable prestige, and received private support early on, in addition to state funds.

The University of Michigan was another pioneer in this movement, with its initial alumni endowment fund established in 1887 – \$2,000 from the sale of a farm owned by Mary Porter, the first woman to attend the university. In his inaugural address in 1871, Michigan President James Angell spoke about alumni indebtedness, and noting many generous gifts to private universities from their alumni, stated that Michigan, too, had a need for books, endowed chairs, and a museum, and noted that while the State furnished aid, there was additional “room for munificence” (Curti & Nash, 1965, p. 187). Alumnus William Wilson Cook, a graduate from 1882, gave generously to his alma mater in life and also bequeathed a major benefaction, resulting in total benefactions of more than \$8 million, and a substantial number of scholarships, fellowships, a law research fund, and an impressive law quadrangle (Curti & Nash, 1965, p. 198). These gifts helped to set examples to other alumni, and set the pace for future fundraising efforts. However, with the exception of Kansas, these were not part of an organized effort, but rather due to philanthropic individuals who wished to provide support to the university, either in response to a specific need, or through a bequest.

The University of Wisconsin had two significant historical gifts, which continue to impact that university, and influenced other universities in copying their practice. In 1906, William Vilas, a Wisconsin graduate, attorney and owner of successful lumber businesses, left a bequest to the university stating that following the death of his wife and daughter, the residuary estate would go to the university to endow well-funded professorships for top-level faculty who would devote most of their time to research. The residuary estate was several million dollars, and the endowed funds continue to enhance the research production at the university (Curti &

Nash, 1965, p. 199). This creative funding of an estate gift that provided for family as well as alma mater, and the focus on endowing research professorships was an early leader in public university philanthropy.

In 1948, the University of Michigan became the first public university to launch a capital campaign, raising \$8.5 million for the Michigan Memorial-Phoenix Project, focusing on atomic energy. This campaign was a five-year effort, and at the conclusion – due to the success of the campaign, and realizing the future potential of private giving – the university established the first permanent development program at a public university in the nation (Duderstadt, in Rhodes, 1997, p. 23). Ten years later, Michigan was the first public university to launch a capital campaign, a three-year effort that raised \$72.8 million, indicating that there was substantial philanthropic interest from businesses, alumni and friends (Duderstadt, in Rhodes, 1997, p. 28). While some others followed suit, it was not until nearly two decades later that many public universities began the quest in earnest for private funds through an organized campaign effort. As Lasater (2006) noted, higher education fundraising efforts allow the institutions to obtain monetary support that provides protection against variation in state appropriations, enrollment patterns, or other areas where there is a financial shortfall.

While organized fundraising was once considered almost exclusively the domain of private colleges, in a matter of a few decades it has become the norm for public universities and their donors. The Ohio State University completed its first major comprehensive campaign in 1989, raising \$429 million in five years – a record amount for a public university at that time (Duronio & Loessin, 1991, p. 2). In September of 1992, the University of Michigan launched a five-year \$1 billion campaign effort, becoming the first public university in the nation to top the billion-dollar level (Duderstadt, in Rhodes, 1997, p. 23).

That campaign began a groundswell of campaigns from other public universities, in part to counter the budget cuts they were facing from state and federal governments, and in part due to recognition that sizable funds could be raised from private sources if a well-coordinated, strategically selected group of volunteers was selected to work in tandem with university leadership to achieve university initiatives. Although costs of higher education continue to rise, and in many cases exceed the rate of inflation, the proportions of public funding are declining (Liu, 2006).

In describing why Michigan administration continually invests time and money in development efforts and periodic campaigns, then President James Duderstadt stated:

Private fund-raising has become key to the university's ongoing success. In the past, the U-M's goal was to use private giving to provide 'the margin of excellence'; today the goal is more basic: To recognize that private giving increasingly will replace - not augment - an eroding base of state financial support. . . . Private giving is the university's only fiscal resource with the potential for significant growth. (Duderstadt, in Rhodes, 1997, p. 24)

Duderstadt and his predecessors recognized earlier than many of their peers the future direction of government subsidies, and one potential way to counter its effects and continue to move their university forward. With government funding for higher education stagnant or in decline, a global economy increasing the need for an educated workforce, and demographic changes in the U.S. with a rise in immigrant and low income families (Friedman, 2006), universities need to better understand what motivates donors to give large philanthropic gifts in the hope of retaining these donors, and upgrading them to ever larger givers (Marudas & Jacobs, 2004).

## Motivations for Giving

There are numerous variables that influence donors in their decisions as to where to give their financial support and how much to give. The more a development officer or campaign volunteer can determine what motivates a particular person to give and likewise engage the potential donor, the greater likelihood that person will make a substantial gift. There are four different primary groups of donors to higher education: alumni; non-alumni, or “friends” of the university; corporations; and foundations (Liu, 2006, p. 121). Each group of donors has different reasons for providing financial support. This section will focus on motivations of individuals, either alumni, or friends of the institution.

Fransen (2007) notes that 10 percent of higher education operating funds come from private philanthropy. He states that there has been a shift in how many donors are approaching gifts to higher education, and increasingly are looking for impactful, measurable results, rather than simply responding to need. In fact, according to longtime fundraising consultant Panas (2005), need is rarely cited as a reason major donors give. In his qualitative review of 50 donors who have made gifts of at least \$1 million, donors said that need is usually assumed with a non-profit organization, but that it does not motivate them to give. Among the motivations Panas (2005) found with recurring frequency are a strong sense of duty, the opportunity to make a difference, spiritual obligation, and giving by association, or as one of his interviewees stated, “being a part of ‘the club,’ being associated with prominent men and women who are giving to the same cause” (Panas, 2005, p. 34). Panas also stated that making gifts of this level is rarely rational, but that passion, rather than reason, prevails, as major gifts are often made for emotional reasons. Donors who gave at this high level all had a long association with the institution—in some cases for several decades—and had a history of making prior gifts to the institution as well.



One of the variables Schervish (1997) found influenced giving was what he termed the concept of “communities of participation.” Like Panas’ findings on giving by association, Schervish states that association through organized clubs or other formal or informal networks, such as boards, that are associated with the institution increases likelihood of giving.

Leslie and Ramey (1988) studied 73 research universities and found that size, expenditures per student, endowment per alumnus, and regional growth of the area in which the university was located are significantly positive in relation to funds raised. Pride in an institution can also be a motivating factor for giving. A study by Smith and Ehrenberg (2003) found that alumni from institutions in the top tier rankings of *U.S. News & World Report* are more likely to be donors than those from institutions with bottom tier rankings, and that wealthier institutions, as measured by endowment per student, receive more private support from both alumni and friends (p. 74).

As the development profession has matured, several different models have been developed to explain the process of giving. One of the most well-known models is described as the “five I’s” (see Figure 2).

*Figure 2.* The Five I’s (Greenfield, 1999).

*identification* → *ascertain interest* → *information* → *involvement* → *investment*

This model states that one needs to identify potential donor prospects, ascertain their interest in a particular project or institution, inform them about the project, involve them in a meaningful way, and ask for the investment in the project.

Quality academics also serve as a motivation to give. Based on an alumni assessment survey administered to alumni of a large state university, Gaier (2005) found that there is a significant positive relationship between alumni satisfaction with the academic system as undergraduates and their willingness to donate. It also found that alumni who lived in the state where the university is located were also more likely to be involved with the institution including through giving financial support.

In a study of married couples to determine if one can predict which couples are more likely to donate to education, it was learned that the educational attainment of both spouses is positively associated with increased giving to education, as is family income and wealth, excluding home values (Rooney, Brown, & Mesch, 2007). The study also found that women are the primary decision-makers when giving to education and are more likely to have a positive effect on both the likelihood of giving to education and the amounts given. The exception is with couples from strict Protestant religious affiliations where the husband has a higher probability of making the decisions regarding giving. These findings have tremendous value to development professionals in educational institutions. As women's earnings rise, they will increasingly be able to influence even larger gifts to education. Also, when meeting with prospective donors, it is important to meet with them as a couple, or if that cannot be arranged, the findings would indicate it may be more important to meet with the wife than the husband in soliciting gifts.

James (2008) also substantiated the finding that educational attainment of individuals increased the likelihood that they would give to educational institutions. In fact, more than three times as many donors to educational institutions completed a graduate degree in comparison to donors to other organizations. As each level of educational attainment increased, the participants were more likely to become education donors. Even when holding factors such as income and

wealth constant, the results show the most dominant factor associated with educational giving is the household's educational attainment.

Other characteristics found to be predictive of donative behavior on the part of alumni include reading alumni publications, and involvement with the university as an alumnus/a, as well as an attitudinal characteristic that the university has a need for philanthropic support from alumni (Taylor & Martin, 1995). In a study of charitable giving of alumni from a large public university, Okunade, Wunnava, and Walsh (1994) found that graduates of the business school, alumni who had both an undergraduate and a graduate degree from the institution, and alumni who had been members of non-Greek social organizations were the individuals most likely to be donors to their alma mater. The alumni of Greek social organizations who gave were more likely to donate to non-academic purposes (e.g. extracurricular activities, athletics, etc.), while alumni of non-Greek clubs were more likely to donate more significantly to academic purposes. Of interest in this study is the fact that alumni who were honors graduates were less likely than non-honors graduates to make philanthropic gifts to their alma mater (p. 80).

Feelings toward the academic system alumni experienced while students also plays a role in their willingness to contribute to alma mater (Gaier, 2005). The more positive relationship alumni had with their academic experience, the more likely they were to give financially as well as to be involved with the university in other ways as well, including board service, promoting the institution to prospective students, and through other means of advancing the university to key decision-makers such as corporate leaders and legislators. Other factors the study points to as influencing alumni to financially contributing at any level include extracurricular involvement as a student, involvement as an alumnus, institution tradition and prestige, economic success of

the individual, emotional attachment to the institution, academic success, and overall satisfaction with the student experience (Gaier, 2005, p. 280).

Emotional and psychological needs play an important role in philanthropic giving as well. Maslow's theory of hierarchy of needs (Hersey, Blanchard, & Johnson, 2001, p. 37) states that once a person's basic physiological and safety needs are fulfilled, the individual seeks social (affiliation), and esteem (recognition) gratification. Because humans are social beings, they have a natural need to belong to different groups, and to be accepted. They strive for meaningful relationships. The ultimate level of fulfillment in Maslow's theory is self-actualization – the need to maximize one's potential, whatever that may be. His theory helps to explain why many people give to help others. Philanthropic involvement in higher education can serve as self-actualization for some major gift donors. Giving is purely voluntary, and allows the donor to belong to a special group of individuals who may influence particular programs at a university, while certainly having a positive impact on human lives through the support of scholarships or other specific programs.

In Schervish's (2005) qualitative study of 130 wealthy donors in 11 different communities throughout the U.S., he examined three sets of research findings on donor motivation. The first is that wealthy donors are "hyperagents," working to establish or control the institutional framework within which they and others live. This may be in the workplace as well as the larger community, where often, their philanthropy is directed in an effort to achieve these goals. The second set of findings is the "identification model of caritas." Philanthropists demonstrate an ethic of care, and in trying to meet the needs of others, they connect to their own inner needs. The study also found associational dynamics of charity, in that the largest amount of giving and volunteering is done in activities with which the donor is directly associated. The

responses of those interviewed highlighted a common theme of donors wanting to shape a charitable cause, rather than just support it. This is logical, and speaks to the importance of higher education institutions involving current and potential donors on boards, in committee work, guest lecturing, and in other meaningful ways.

Income and level of education also impact donor motivation, as seen in the Center on Philanthropy's Understanding Donor Motivations for Giving study (2009). This study found that donors whose income and education levels were lower were more likely to give to causes that provide for people's basic needs, and were motivated by "helping the poor help themselves," while those of higher income and higher educational attainment were more likely to contribute to causes to "make the community better" or to "make the world better" (pp. 4-5).

Wang and Graddy (2008) also found that social capital has a positive impact on giving. They found that belonging to associations and increasing personal and organizational connections increases one's knowledge of non-profit causes and the likelihood that one will be asked to financially contribute. Further, they found that being active in an organization increases the amount of giving, and that there is a positive relationship between volunteering and giving. This buttresses the researcher's theory that being involved on an organization's board or serving in a volunteer capacity will ultimately benefit the organization financially as well as through volunteer time. The demographic data from Wang and Graddy's study (2008) illustrates that the longer period of time one lives in a community, the more likely one will make financial gifts to a local institution, demonstrating the importance of social capital, as presumably, one who has lived in a community longer will have more friends and ties within the community. This has value to university advancement offices, as there may be many longtime residents in their local communities who regardless of where they received their own university education – if at all –

may be interested in becoming a donor because the university is part of the community, and so are they.

A study with perhaps the least amount of surprising information determined that the more alumni who are solicited for gifts to their alma mater, the more who participate and the more funds are raised. Gottfried and Johnson (2006) reviewed survey data on 2,986 colleges and universities in the U.S. over 12 years, and a subset of the 117 schools ranked by *U.S. News & World Report* in the magazine's top two tiers of national universities and colleges. The study found a significant positive impact of solicitation of alumni in securing donations. A one percent increase in solicitation increased the participation rate within a range of 0.3 to 3.9 percent overall, while a one percent increase in alumni solicitation by the schools in the two top-tiers resulted in a 28 percent increase in alumni donations. This has relevance to the advancement field as it demonstrates that investing in increased solicitation will favorably impact alumni participation rates.

### Summary

While philanthropic giving to the academy can trace its roots from ancient Greece, to medieval Europe, and to the founding of the private colleges and universities in the United States, philanthropic giving to public higher education is a much more recent phenomenon. Although some public universities benefitted through passively receiving bequests or an occasional large gift, organized fundraising efforts did not begin in earnest at most public universities until the decades of the 1970s and 1980s. The advent of the capital or comprehensive campaign for most public universities started several years later, with many universities launching their first major efforts in the 1980s - 2000s. A primary reason that organized philanthropic giving to public higher education started so much later than at its private peers is

that state funding had initially covered the majority of the costs of tuition and capital plants; but as government funding decreased, public universities saw fundraising as a way to obtain funding to offset rising costs.

With the need for private giving increasing, college advancement units need to have a better understanding of what motivates donors to give, so that they may use their human and financial resources wisely. Research in the field of philanthropic giving is relatively new, but studies to date show that among the reasons donors give to higher education are income, increased level of education, positive academic experience (or a positive perception of the academic quality of the institution), social capital, regular communication, involvement through volunteer service or attendance at events, and desire for self-actualization. Most of the studies to date have taken place at either private elite institutions, or at large, research-intensive institutions.

This study adds to the body of knowledge on philanthropic giving to higher education, as it specifically looks at why donors chose to make a major gift of \$25,000 or more to a philanthropic fundraising campaign at a mid-size, Midwest public university, and if variables such as distance to campus, involvement on a university board, age, gender, and income impact the size of the gift.

## CHAPTER 3: METHODOLOGY

The purpose of the study was to determine what motivating factors best predicted the amount of major philanthropic gifts of \$25,000 or more to Bowling Green State University during its Building Dreams Centennial Campaign. The research design used for this study was correlational. The study used secondary data from a survey conducted through the Bowling Green State University Office of Alumni and Development in March 2009.

### Participants

There were 310 individuals throughout the United States who made gifts of \$25,000 or more to the Building Dreams Centennial Campaign. All of these donors at the \$25,000 level and above were offered the opportunity to participate in the Building Dreams Campaign Major Donor Survey. While the majority of the survey respondents were alumni (141, or 78.3%), there were some who were not. The donors lived in states throughout the country, but were most heavily concentrated in Ohio, California, Florida, Michigan, and New York. Their ages ranged from 40 years to 90 years, with the majority being in their sixth or seventh decade of life.

### Instrumentation

The survey created for this study was the Building Dreams Campaign Major Donor Survey. The study's questions on motivation were modeled from a 2008 Bank of America survey of high wealth donors conducted by the Indiana University (IU) Center on Philanthropy, and from questions developed by Dr. Thomas Grabau of the fundraising consulting firm, Bentz Whaley Flessner, of Minneapolis and Washington, D.C. The IU Center on Philanthropy is the leading center for the study of philanthropic giving in the country, so questions modeled after their research have peer legitimacy. Dr. Grabau (Currents, 2006; Points of Practice, 2010) is a well-published leader in the field of philanthropic consulting and had served in a consulting



capacity for BGSU's Building Dreams Campaign and was therefore familiar with both the university and the donor base. The confidential questionnaire had a total of 34 questions, plus an additional open-ended item inviting respondents to make comments. The survey was broken into five sections: 1) giving to Bowling Green State University; 2) motivation; 3) communication and marketing; 4) stewardship; and 5) demographics. Motivation questions allowed for selection of multiple responses covering different variables, such as belief in the mission of the university, the administrative leadership (president, dean, unit director), obligation to give back to one's alma mater, involvement on a governing or advisory board at BGSU, desire to help students, or cultivation efforts of a development officer. This survey was appropriate to use for this audience and purpose because it was able to give insight regarding donor motivation and behavior that can be instructive for planning efforts for future campaigns.

The dependent variable was the amount of major philanthropic gifts, which was quantitative, and was measured according to the size of the gift recorded by the donor on the survey. The independent variables were the motivating factors. These included belief in the mission of the university, the administrative leadership (president, dean, athletic director, or other administrative leader), obligation to give back to alma mater, involvement on a governing or advisory board at BGSU, desire to help students, desire to help faculty, and visits and solicitation from a development officer. The purpose for selecting this type of survey was that it allowed respondents to choose multiple categories for why they made a major gift.

The first section of the survey was Giving to Bowling Green State University. It included seven questions regarding the number of years the donor had given to BGSU, the type (cash, stock, bequest, etc.) and amount of gift made to the Building Dreams Centennial Campaign, the frequency of giving, and relationship to BGSU (alumnus, parent, friend). The second section

had six questions on Motivation. Questions included what motivated the donor to make a gift to BGSU, who most influenced their decision to give, from whom the donor sought advice in giving, and what would motivate the donor to make subsequent gifts to BGSU. Respondents were allowed to choose multiple responses to all but the question asking where BGSU ranked in their philanthropic giving priorities.

The Communication and Marketing section of the survey asked nine questions to determine whether BGSU effectively communicated its rationale for private support. Questions included whether BGSU provided the information needed to make a decision on making a donation, if the Building Dreams Campaign's case for support influenced the donor's decision, whether the donor's opinions and ideas were listened to and valued by BGSU, if questions regarding donations were answered respectfully, and to what area the donor was most inclined to give support when asked. The Stewardship section asked eight questions, seven of which were on a Likert scale with six response options ranging from very satisfied to dissatisfied (including undecided). The questions focused on how satisfied donors were with their ability to designate how the donation was to be used, if the donors were satisfied with the information they received from BGSU regarding the use of the donation, and with how the funds were actually used. Also, a question was asked whether the donors were satisfied with the recognition they received and with donor benefits. The one stewardship question that did not include a Likert scale response asked whether the respondent had included BGSU in their estate plans. It is thought that including the institution in estate plans indicates a high level of satisfaction. The final section was on Demographics and included four questions regarding gender, age, geographic location, and range of annual household income. There was also one open-ended question soliciting other comments.

The survey was administered online for those who had provided the BGSU Office of Alumni and Development with e-mail addresses, and through first class mail for the others. A second mailing (e-mail or first class) was sent to those who do not respond within the first four days for those with e-mail, and within three weeks for those contacted through first class mail. A first class mailing was then sent to those who had not responded by e-mail. It was anticipated that the participation rate would be high, as donors who commit a minimum of \$25,000 to an institution have made a sizable investment and that was realized through a participation rate of 58 percent.

By offering confidentiality, but not anonymity, the surveys were able to be identified as to whom had given what amount of gift. This, along with sending the survey to all major donors to the campaign, issuing a follow-up opportunity for those who had not previously responded, and offering confidentiality, helped to ensure that what was intended to be measured was, in fact, measured, ensuring test validity and reliability (Colosi, 2008). As the entire campaign individual donor population at the major gift level was surveyed, and 58% of them responded to the survey, it is believed that the researcher was able to draw meaningful inferences about the BGSU major donor population and what factors motivate them to give to the university. This will be helpful to future fundraising campaigns at BGSU and similar type institutions; it can serve to assist the development staff in determining which donor prospects are those most likely to give at significant levels if time is spent with them, and who helps to influence a gift. Reliability was maximized by standardizing the administration and scoring procedures and having a sizable number of survey items for the respondents.

## Procedures

The survey was sent through e-mail to those for whom the BGSU Office of Alumni and Development had e-mail addresses and by first class mail to the others. It was sent a second time four days later to those with e-mail addresses who had not responded, and within three weeks of the original mailing to those with first class mail addresses who had not previously responded. The survey was issued confidentially through coding, but not anonymously, as an important component of the study is determining the amount given.

## Research Questions

This study sought to address the following research questions:

- 1) Does the amount of the major gift differ by age, geographic region, and gender?
- 2) Does the amount of the major gift differ by the presence of motivational factors?
- 3) Does serving on a voluntary board at the university impact the amount of gift?
- 4) Which motivational factors and demographic variables best predict the amount of the gift?

## Data Analysis

The motivating factors were the independent variables and these factors are dichotomous because respondents indicated whether each factor served as a motivator to giving. The dependent variable is the amount of major philanthropic gifts, which was measured using BGSU major gift categories (\$25,000-\$49,999; \$50,000-\$99,999; \$100,000-\$249,000; \$250,000-\$499,999; \$500,000-\$999,999; \$1 million and above) which applied an ordinal scale. Although amount of gift does not have equal intervals, its measurement scale is continuous. As such, the researcher treated the dependent variable as an interval ratio, which is quite common in

behavioral sciences (Virginia Tech, 1999). Multiple regression was used. After data collection, data were entered into SPSS. Descriptive statistics were generated for all survey items.

In response to the first research question regarding if the amount of the major gift differs by age, geographic region, and gender, an ANOVA test was performed for the independent variables of age and region. A *t*-test of independent samples was performed for the independent variable of gender. For the second research question examining whether the amount of gift differs by the presence of motivational factors, *t*-tests of independent samples were conducted for each motivational factor. Regarding the third research question, which examined if serving on a voluntary board at the university impacted the level of giving, a *t*-test of independent samples was used to examine if participating on a particular board impacted the amount of gift. The fourth research question, which seeks to examine which motivational factors and demographic variables best predict the amount of the gift, an interval/ratio scale was applied to the independent variables, in order to conduct multiple regression.

#### Assumptions and Limitations

It is assumed that respondents answered the questions honestly; however, this may not be the case. A possible limitation is the fact that because the respondents were not anonymous, they may not have answered completely honestly. Another potential limitation may be that because many of those surveyed had been contacted by staff of the BGSU Foundation a few weeks before the survey was sent to let them know of their endowment fund's declining value due to the stock market, they may have been frustrated with the lack of earnings (and hence, inability to award funds to the designated campus program) and therefore responded in a more negative manner.

## CHAPTER 4: RESULTS

The purpose of this quantitative study was to examine what motivated individuals to make major gifts of \$25,000 or greater to the BGSU Building Dreams Centennial Campaign, and to learn characteristics about them. This chapter presents the statistical results based on the Building Dreams Campaign Survey that was sent to all 310 individual donors who gave a minimum of \$25,000 to the campaign. A total of 192 e-mail surveys were sent on Tuesday, March 17, 2009, to those individuals for whom the BGSU Office of Alumni and Development had active e-mail addresses. A reminder was sent four days later for those who had not yet responded, and the e-survey was closed on March 26. The remainder of the individuals, 112 people, were sent a print survey through the U.S. postal service on March 11, 2009. On March 27, an additional reminder print survey was sent to those who had not previously responded by either e-mail or through the post-mail. The total response rate for the combined responses was 58% ( $n=180$ ). Not all individuals responded to all questions, so for some questions, the total responses are less than 180.

The individual donors who responded to the survey included 141 (78.3%) who were alumni of BGSU, 31 (17.2%) friends (current or retired faculty and staff, community members, or other non-alumni individuals who support BGSU), and 13 (7.2%) parents of students. (In some cases, respondents checked more than one category as they may have been an alumnus and a parent of a student, or other similar combination). Of the alumni who responded, 11 (5.7%) were graduates from the decade of the 1940s, 36 (18.6%) were from the 1950s, 60 (30.9%) were from the 1960s, 59 (30.4) were from the 1970s, 21 (10.8%) were from the 1980s, 5 (2.6%) were from the 1990s, and 2 (1.0%) were from the decade of the 2000s. (Some respondents hold multiple degrees from BGSU and so listed more than one year for graduation.) Categories of

giving to which the major donors of \$25,000 and more made gifts during the Building Dreams Centennial Campaign, and the number of respondents who gave to each of these categories include 113 (62.8%) to student scholarships, 17 (9.4%) to faculty support (such as endowed professorships), 18 (10%) to the BG Experience Values Initiative, 28 (15.6%) to the Sebo Athletic Center, 15 (8.3%) to the Stroh Center, 10 (5.6%) to the Wolfe Center for the Arts, and 69 (38.3%) to other initiatives that were not listed as specific campaign top priorities, but were counted in the overall comprehensive campaign total. Many of the donors made multi-component gifts to the campaign, so more than one gift category was selected.

The Building Dreams Campaign Survey solicited feedback on questions regarding the financial magnitude of the campaign gift, motivations for making a gift to BGSU, from whom the donor sought advice for making the gift, what would motivate the donor to make subsequent gifts, among other questions, and also sought demographic information regarding gender, age, geographic location, and the range of the annual household income. The data collected were organized and analyzed by frequency distribution, descriptive statistics, and correlations using Microsoft Excel and the Statistical Package for the Social Sciences (SPSS).

Information regarding whether or not each participant had served on a board, and if so, which board(s) at BGSU was obtained by checking the Ascend database through the BGSU Office of Alumni and Development. This database is the official alumni and donor database at BGSU which tracks all alumni and donor involvement and serves as the database of record for board service at BGSU. The volunteer advisory and governing boards included in the study were the Alumni Board of Directors, the College Advocate Boards, the Falcon Club Advisory Board, the Firelands Development Board, the Foundation Board of Directors, and the University Board of Trustees.

The results are presented for each research question, along with a discussion of demographic and descriptive characteristics. First, characteristics of the sample are presented, followed by descriptive data from the responses, indicating frequencies and percentages of donation variables. Second, the presence of motivating factors and difference in levels of gifts is examined. Third, the results of multiple ANOVAs and t-tests of independent samples are presented to examine significant differences between genders, among age categories, and among regional geographic territories. Forward multiple regression results are then presented to examine which demographic variable and motivating factors best predict the amount of gift.

#### Characteristics of Sample

The participants in this study were individual major gift donors to the BGSU Building Dreams Centennial Campaign who made a minimum gift of \$25,000. As Table 1 illustrates, 73 (41%) participants made gifts of \$25,000-\$49,999, 40 (22.5%) participants made gifts of \$50,000-\$99,999, 30 (16.9%) participants were donors of \$100,000-\$249,999, 9 (5.1%) participants made gifts of \$250,000-\$499,999, 10 (5.6%) participants made gifts of \$500,000-\$999,999, and 16 (9.0%) made gifts of \$1 million or more.

Table 1

#### *Frequencies and Percents for Donation Variables*

Amount of Gift	<i>f</i>	%
\$25,000-\$49,999	73	41.0
\$50,000-\$99,999	40	22.5
\$100,000-\$249,999	30	16.9
\$250,000-\$499,999	9	5.1
\$500,000-\$999,999	10	5.6
\$1 million or over	16	9.0



The length of time the survey participants had been making philanthropic gifts to BGSU varied from less than one year to more than twelve years (see Table 2). One (0.6%) survey participant had been giving less than one year, 13 (7.3%) participants had been giving for 1-3 years, 10 (5.7%) participants had made gifts for 4-6 years, 10 (5.7%) participants had given for 7-9 years, 22 participants (12.6%) had given for 10-12 years, and 119 participants (68%) had been giving for more than 12 years.

Table 2

*Information on Length of Time as Donor to BGSU*

Donor length	<i>f</i>	%
Less than one year	1	0.6
1 to 3 years	13	7.3
4 to 6 years	10	5.7
7 to 9 years	10	5.7
10 to 12 years	22	12.6
More than 12 years	119	68.0

Annual household income level varied from under \$50,000 per year to greater than \$1 million per year. Thirty-two (18.0%) respondents did not report their annual household income. Seven (3.9%) respondents had income of \$25,000-\$49,999, 24 (13.5%) participants had income of \$50,000-\$99,999, 56 (31.5%) participants reported income of \$100,000-\$249,999, 30 (16.9%) participants had income of \$250,000-\$499,999, 15 (8.4%) participants had income of \$500,000-\$999,999, and 14 (7.9%) participants reported annual household income of \$1 million or more (see Table 3).

Table 3

*Annual Household Income of Survey Participants*

Annual Household Income	<i>f</i>	%
Didn't report	32	18.0
\$25,000-\$49,999	7	3.9
\$50,000-\$99,999	24	13.5
\$100,000-\$249,999	56	31.5
\$250,000-\$499,999	30	16.9
\$500,000-\$999,999	15	8.4
\$1 million or more	14	7.9

Other characteristics and results of note include the type of gift these donors made to BGSU. One-hundred-forty-six (81.1%) of the survey participants made gifts of cash. The second most popular way to give was through stocks, with 41 (22.8%) individuals giving through that method. Twenty-eight (15.6%) people gave through a bequest, 8 (4.4%) through a charitable gift annuity, 12 (6.7%) through a charitable remainder trust, 12 (6.7%) through in-kind items, 1 (.6%) through life insurance, and 1 (.6%) checked the not applicable box. Respondents could check more than one way of having made a gift.

When asked what area the donor is most inclined to be responsive to for future financial appeals from BGSU, 96 (43.1%) checked scholarships, 52 (23.3%) said specific academic programs, departments or schools, 29 (13.0%) said athletics, 22 (9.9%) said the permanent endowment, 11 (4.9%) said capital facilities, 3 (1.4%) said operating support, and 8 (3.6%) said none of the above. Two (.90%) checked not applicable.

### Research Question One

Does the amount of the major gift differ by age, geographic region, and gender?

An independent samples *t*-test was conducted to examine gender differences in the amount of the major gift (see Table 4). The results indicated a significant difference between men and women, with men more likely to give a major gift at a higher level ( $M=2.58$ ) than women ( $M=1.89$ ).

Table 4

#### *Gender Differences in Major Gift Levels*

	<i>n</i>	<i>M</i>	<i>SD</i>	<i>t</i>	<i>p</i>
Male	130	2.58	1.67	2.53	.012
Female	45	1.89	1.32		

Age and geographic regional differences were analyzed using ANOVA and a post-hoc Scheffe test (see Tables 5 and 6). The results indicated there is a statistical significance in the age of the donor in determining the amount of major gift. Donors in the 70-79 age range made the highest level of gift and were significantly different from the youngest group (age 49 or younger). There was no significant giving difference based on geographic region. The three geographic regions defined for purpose of this study were within a 60-mile radius of BGSU (this included going north into Michigan), more than 60-mile radius but within the State of Ohio, and out-of-state (excluding the area of Michigan that fell within a 60-mile radius of BGSU).

Table 5

*Regional differences*

	<i>n</i>	<i>M</i>	<i>SD</i>	<i>F</i>	<i>p</i>
1 hour drive	61	2.23	1.58	.69	.503
In State (1 hr+)	29	2.66	1.82		
Out of State	79	2.39	1.56		

Table 6

*Age Group Differences*

	<i>n</i>	<i>M</i>	<i>SD</i>	<i>F</i>	<i>p</i>
49 yr or younger	17	1.71*	0.92	3.71	.006
50-59	35	2.03	1.15		
60-69	61	2.49	1.58		
70-79	37	3.08*	1.99		
80+	21	1.95	1.4		

\*Age group 70-79 is significantly different from youngest group.

### Research Question Two

Does the amount of major gift differ by the presence of motivational factors?

A *t*-test of independent samples was conducted for each motivating factor to determine if the presence of such a factor impacted the amount of giving. Table 7 presents these results and indicates only one statistically significant difference. The factor of Being Asked had a statistically significant negative impact on the amount of major gift given indicating that those who perceive Being Asked as a motivation give significantly less than those who did not identify this as a motivating factor to give. The motivation of Leaving a Legacy to BGSU, while not statistically significant, was very close to significance and therefore may imply a practical

difference whereby those who were motivated by Leaving a Legacy gave a higher amount than those who were not motivated by this factor.

Table 7

*Motivational Differences in Gift Levels*

Motivational factor	Yes			No			<i>t</i>	<i>p</i>
	<i>n</i>	<i>M</i>	<i>SD</i>	<i>n</i>	<i>M</i>	<i>SD</i>		
Give back to BGSU	135	2.44	1.61	43	2.23	1.61	-0.73	.470
Bring about a desired impact	71	2.44	1.55	107	2.36	1.66	-0.33	.742
Desire to sponsor innovation	22	2.77	1.57	156	2.33	1.61	-1.20	.232
Identified with project	71	2.34	1.66	107	2.42	1.58	0.33	.739
Create value	20	2.35	1.57	158	2.39	1.62	0.11	.912
Tax benefits	51	2.29	1.75	127	2.43	1.56	0.49	.624
Pressure from my friends	4	2.25	1.89	174	2.39	1.61	0.17	.863
Made good business sense	6	3.17	1.60	172	2.36	1.61	-1.21	.229
Being asked	46	1.89	1.35	132	2.56	1.66	2.46	.015
Want to limit funds to heirs	4	2.50	1.73	174	2.39	1.61	-0.14	.888
Leave a legacy at BGSU	75	2.63	1.77	103	2.21	1.47	-1.70	.091
Desire to transform	22	2.64	1.56	156	2.35	1.62	-0.77	.440
Desire to facilitate improvement	50	2.48	1.74	128	2.35	1.56	-0.48	.634
Share good fortune	65	2.28	1.64	113	2.45	1.56	-0.70	.488
Meet critical needs	28	2.32	1.49	150	2.40	1.63	0.24	.813
Recognition and respect	33	2.27	1.59	145	2.41	1.62	0.45	.651
Expected in my social network	3	2.33	2.31	175	2.39	1.60	0.06	.953
Religious beliefs	14	2.07	1.59	164	2.41	1.61	0.76	.445
Set an example	40	2.45	1.54	138	2.37	1.64	-0.28	.782
Helping those with less	70	2.26	1.46	108	2.47	1.70	0.87	.385

### Research Question Three

Does serving on a voluntary board at the university impact the amount of gift?

A *t*-test of independent samples was used to examine if participating on a particular board as well as any board impacts the amount of gift (see Table 8). If individuals had served on more than one board, they were included in an analysis for each board on which they had served.

Participation on two specific types of boards (Board of Trustees and Foundation Board) revealed significant differences in the amount of giving. In addition, a difference was found in the amount of giving when comparing those who participated on any board ( $n=71$ ,  $M=3.04$ ) to those who did not participate ( $n=107$ ,  $M=1.95$ ).

Table 8

#### *Type of Board Participation and Amount of Giving*

Participation	Member			No			<i>t</i>	<i>p</i>
	<i>n</i>	<i>M</i>	<i>SD</i>	<i>n</i>	<i>M</i>	<i>SD</i>		
Advocates Board	9	2.44	1.67	169	2.38	1.61	-0.11	.914
Board of Trustees	10	3.90	1.79	168	2.30	1.56	-3.14	.002
Foundation Board	42	3.71	1.61	136	1.98	1.37	-6.86	<.0001
Alumni Board	21	2.62	1.63	157	2.36	1.61	-0.70	.484
Any Board	71	3.04	1.79	107	1.95	1.31	-4.68	<.0001

ANOVA with a post-hoc Scheffe test was used to examine if the level of board participation impacts the amount of gift (see Table 9). Individuals were categorized into three groups based upon board participation: no board, single board, and multiple boards. Results revealed significant group differences with No Board Participants giving significantly less than those with Single Board or Multiple Board participation. Those with Multiple Board participation gave the highest amount, which was significantly greater than those with Single Board participation.

Table 9

*Level of Board Participation and Amount of Giving*

Participation	<i>n</i>	<i>M</i>	<i>SD</i>	<i>F</i>	<i>P</i>
No Board	107	1.95	1.31	13.43	<.0001
Single Board	46	2.76	2.76		
Multiple Boards	25	3.56	3.56		

## Research Question Four

Which motivational factors and demographic variables best predict the amount of the gift?

The researcher used forward multiple regression to determine which demographic variables and motivating factors best predict the amount of gift. A significant model with five variables was generated,  $F(4,134) = 10.29$ ,  $p < .0001$ , which accounted for approximately 29% of variance in the amount of giving (see Table 10). Variables entered into the model included: income, Leaving a Legacy, age, Identifying with Project, and Board Participation. Regression coefficients are presented in Table 11. Income was entered first into the model and accounted for the greatest amount of variance in amount of giving.

Table 10

*Model Summary Predicting Amount of Giving*

Step	<i>R</i>	<i>R</i> <sup>2</sup>	<i>R</i> <sup>2</sup> <sub>adj</sub>	$\Delta R^2$	<i>F</i> <sub>chg</sub>	Sig <i>F</i> <sub>chg</sub>
Income	.375	.141	.135	.141	23.608	.000
Leave Legacy	.441	.195	.183	.054	9.564	.002
Age	.482	.232	.216	.038	6.949	.009
Identified with project	.515	.266	.245	.033	6.392	.013
Board participation	.539	.291	.265	.025	4.944	.028

Table 11

*Regression Coefficients*

	<i>B</i>	$\beta$	<i>t</i>	Bivariate <i>r</i>	Partial <i>r</i>
Income	.482	.388	4.826	.375	.378
Leave Legacy	.626	.192	2.626	.170	.217
Age	.030	.215	2.948	.127	.242
Identified with Project	.543	.165	2.299	.161	.191
Board participation	.581	.176	2.223	.332	.185

## Summary

The purpose of the study was to examine what motivated individuals to make major gifts of \$25,000 or more to the BGSU Building Dreams Centennial Campaign, and to learn characteristics about them. Data were collected from the Building Dreams Campaign Survey, which was sent to all 310 individuals who gave \$25,000 or greater. A total of 58% of those contacted responded to the survey. The survey solicited feedback on the size of the campaign gift, motivations for making the gift, and demographic data such as household income, geographic location of home, whether or not the individual was an alumnus, length of time they had been a donor to BGSU, gender, and age, among other questions. To determine whether or not each participant had served on a volunteer board at BGSU, information was obtained through the Office of Alumni and Development database, which is the database of record for university board service.

The first research question asked: Does the amount of the major gift differ by age, geographic region, and gender? The results showed that there is a significant difference by age, and also by gender, but not by geographic region. The second research question asked: Does the amount of major gift differ by the presence of motivational factors? Respondents were given 20 different possible motivational factors and allowed to choose as many of them as they wished. Only one of these variables showed statistical significance. The factor of Being Asked had a



negative statistical significance on the gift. Research question three asked: Does serving on a voluntary board at the university impact the amount of gift? The results showed that there was a positive correlation between serving on a board and the size of gift, and that those who served on the Board of Trustees or Foundation Board had positive significant differences in the amount of giving. The fourth research question asked which motivational factors and demographic variables best predict the amount of gift. Income accounted for the greatest amount of variance in the amount of giving.

## CHAPTER 5: DISCUSSION, RECOMMENDATIONS, AND CONCLUSION

### Introduction

This study was undertaken to determine if there were certain factors or other characteristics that motivated individuals to make major gifts of \$25,000 or above to the BGSU Building Dreams Centennial Campaign. Findings from the study can assist development professionals and researchers interested in philanthropic giving obtain a better understanding of how to engage potential major donors and what characteristics to look for in prospective donors. Ultimately, the findings from the study can result in better utilization of both human and financial resources in development offices in higher education, by ascertaining with which prospective donors development officers should spend their time cultivating and asking for a gift.

This chapter begins with a summary review of the overall study and includes a discussion of the findings from each research question. The general purpose of this chapter is to summarize the purpose for the study, discuss the findings, draw conclusions and inferences from the findings, and make recommendations. The recommendations will be for practitioners in the advancement profession, and for future research studies of related topics. The chapter is organized into three sections. The first section is a review of the study, and considers the significance of the four research questions that form the study. A discussion of the statistical results as they relate to each research question, and inferences drawn from the results and the literature make up the second part of the section. The second section draws additional conclusions concerning recommendations for higher education development practitioners as well as for researchers who are interested in exploring the field of philanthropic giving as it relates to colleges and universities. The third section presents conclusions of the study.

### Review of the Study's Purpose

If the United States wishes to remain economically competitive in the world, it must educate its citizenry. In order for a worker to achieve middle class economic status, and to maintain employability, post-secondary education is increasingly a necessity. The need for higher education occurs, however, simultaneous to diminishing state funding for public higher education due to rising health care costs, mandates, and the severe recession of 2008-09 (U.S. Office of Management and Budget website, 2009). At the same time, the population of the U.S. continues to grow—increasing from 226,545,805 people in 1980 (U.S. Census Bureau, 2009), to now over 305,529,000 people—with the highest birthrates among immigrant and low-income populations (U.S. Census Bureau, 2009).

To meet society's need for increased post-secondary education that is accessible and affordable, colleges and universities are increasingly turning to private giving to defray the costs of an education. While private universities in the U.S. have been raising philanthropic funds since their founding (Cook & Lasher, 1996; Fisher, 1989), the advent of the fundraising campaign in 1905, modeled after the successful campaigns of the YMCA, brought a systematic approach to the efforts and greatly enhanced the fundraising process (Cutlip, 1965). Fundraising for public universities began much later; while the University of Michigan held a small organized campaign effort as early as 1948, when the university conducted the Michigan Memorial-Phoenix Project to raise funds for the study of atomic energy (Duderstadt, in Rhodes, 1997, p. 23), capital or comprehensive campaigns at public universities are a phenomenon that began in earnest at the largest institutions approximately 30 years ago, with many smaller or mid-size institutions having launched their first major effort within the past decade. While fundraising campaigns were once the exclusive domain of private institutions of higher

education, once started at public universities, they have quickly caught on in popularity and, due to the financial stresses on state budgets and their subsequent effect on state universities, fundraising campaigns have become a way to pay for new buildings, scholarships for recruitment purposes, special scholastic programs, and faculty enhancement funds, among other causes.

Resources – both human and financial – are increasingly strained on public university campuses due to budget shortages. In an effort to determine which alumni and other prospective supporters are most likely to give major philanthropic gifts to university fundraising campaigns, this study examined relationships between demographic characteristics, motivational factors, household income, and voluntary board service to determine major gift behavior and level of giving to Bowling Green State University's Building Dreams Centennial Campaign.

#### Discussion of Findings

The study used secondary data garnered from the Building Dreams Campaign Survey from the BGSU Office of Alumni and Development which was sent to 310 individuals who made gifts of \$25,000 or greater to the campaign. The survey had a total of 34 questions, seven of which were statistically analyzed for this study; the survey was divided into five categories: Giving to BGSU, Motivation, Communication and Marketing, Stewardship, and Demographics. The participation rate to the survey was 58%. Of the respondents, 130 (74.2%) were men, and 45 (25.7%) were women; 141 (78.3%) of the survey participants were alumni of BGSU, 31 (17.2%) friends (current or retired faculty and staff, community members, or other non-alumni individuals who support BGSU), and 13 (7.2%) parents of students (in some cases, respondents checked more than one category as they may have been an alumnus and a parent of a student, or other similar combination). The length of time the survey participants had been making philanthropic gifts to BGSU varied from less than one year to more than twelve years. One

(0.6%) survey participant had been giving less than one year, 13 (7.3%) participants had been giving for 1-3 years, 10 (5.7%) participants had made gifts for 4-6 years, 10 (5.7%) participants had given for 7-9 years, 22 (12.6%) had given for 10-12 years, and 119 (68%) had been giving for more than 12 years. Annual household income level varied from under \$50,000 per year to greater than \$1 million per year. Thirty-eight (21.1%) respondents did not report their annual household income. Nine (5.6%) respondents had income of \$25,000-\$49,999, 24 (14.8%) participants had income of \$50,000-\$99,999, 51 (31.5%) participants reported income of \$100,000-\$249,999, 30 (18.5%) participants had income of \$250,000-\$499,999, 14 (8.6%) participants had income of \$500,000-\$999,999, and 14 (8.6%) participants reported annual household income of \$1 million or more.

#### *Discussion of Factors Relating to Giving by Age, Geography, and Gender*

The first research question asked, “Does the amount of the major gift differ by age, geographic region, and gender?” By using ANOVA and a post-hoc Scheffe test, the results indicated that there is a statistical significance in the age of the donor in determining the amount of major gift. Donors in the 70-79 age range made the highest level of gift and were significantly different from the youngest group (age 49 or younger). The researcher believes that it is likely due to the fact that individuals in their eighth decade of life have had time to accumulate wealth, most likely have paid off their financial obligations such as housing and education costs for themselves or of their dependents, their physical and mental health still allow them to make major financial decisions such as giving large philanthropic gifts. Also, it is likely that they may have had time at this stage in life to have engaged in volunteer activities such as board service with BGSU. The youngest group of major gift donors, at 49 and younger, are still in the active wealth accumulation stage of life, may have dependents still at home or in college

for whom they are financially responsible, and have not had as much time to become active as volunteer leaders for non-profit causes such as public higher education.

Through conducting an independent samples *t*-test to examine gender differences in the amount of the major gift, results showed that there is a significant difference of levels of giving between men and women, with men more likely to have made a major gift to the Building Dreams Centennial Campaign at a higher level ( $M=2.58$ ) than women ( $M=1.89$ ). In Rooney, Brown, and Mesch's (2007) study, women were found to be the primary decision makers when making gifts to education. As that study referred to giving at all financial levels, and to educational institutions at all levels including primary and secondary schools, it is possible that there is a generalizable gender difference regarding major gifts. Smaller gifts, such as annual fund gifts that are made in response to direct mail or from a telefund call are typically made from a checkbook or credit card and may be more likely to be made by women. Likewise, gifts to support school fundraisers may be more likely to be made by women if they are involved with support groups such as the PTA. It is also possible that a difference in findings is due to differences in the way the question was asked, or the fact that the survey did not specifically ask if, in the cases where there is a married couple, if the gift-making process was a matter of discussion between the spouses. Such a question, which could have been explored more in-depth in a qualitative research format, or through an open-ended question, may have provided insight as to if the gift was made in isolation, through mutual discussion, or if one spouse more heavily influenced the decision. The explanation may also be generational, as the majority (126, or 70.1%) of major gift donors surveyed in the BGSU Building Dreams Campaign Survey were age 60 or above and come from a generation where males were the dominant wage earners and also most likely to serve in leadership positions both in the workforce and on non-profit voluntary

boards. As BGSU has more female alumni than males (BGSU Alumni and Development Office database statistics), it is important for practitioners of the institution, and at similar institutions, to keep this information in mind. As women are increasingly in leadership positions in the workforce and earn higher wages, and as they serve in greater numbers on voluntary boards of service, this may combine with the earlier findings of Rooney et al. to see more women than men as the primary givers of major gifts to higher education fundraising campaigns.

Geographic regional differences in giving were analyzed using ANOVA and a post-hoc Scheffe test. The results indicated there was no significant giving difference based on geographic region. The geographic regions defined for purpose of this study were within a 60-mile radius of BGSU (this included going north into Michigan), more than a 60-mile radius but within the State of Ohio, and out-of-state (excluding the area of Michigan that fell within a 60-mile radius drive of BGSU). This finding is very useful for practitioners. Gaier (2005) found that alumni who lived within the same state as the institution were more likely to be donors; however, the study did not differentiate among donor levels. A possible explanation for the difference in findings between Gaier's study and the present study is that donors at any level, including small contributors of \$25 or \$50, who live nearer the institution may read and see more news stories, have family or friends currently attending the institution, or be more likely to attend sporting or cultural events and be inclined to make a gift to alma mater for athletic booster or cultural organizations than those alumni who live a farther distance and rarely see or hear anything about their alma mater. As the Building Dreams Campaign Survey only looked at major gift donors, and there was no statistical significance in giving amount among the three geographic areas analyzed, it can be assumed from these findings that if the individuals have the capacity and

inclination to make a major gift to the institution, geographic distance does not hinder the decision of making a gift and the size of the major gift.

It should be noted that all of these major donors had individual attention – usually including a series of personal visits and often a personalized proposal – from a university staff member and in some cases, a campaign volunteer as well, so the individualized attention may well be the factor that explains this difference from the Gaier findings which was inclusive of high-end donors as well as low-end donors who responded to mass solicitations. This is a topic worthy of additional exploration. From a practitioner standpoint, it is therefore important to budget travel and lodging expenses so staff members may personally visit prospective donors who live far from the institution but who have a viable connection and have the financial resources to make a major gift. It is an area that could also be further explored through qualitative research by interviewing individuals which may give additional insight.

#### *Discussion of Difference in Amount of Gift by Motivational Factors*

The second research question examined if the amount of major gift differed by the presence of certain motivational factors. Respondents were given a total of 20 different motivational factors to select from (they could check as many as they wished) as to reasons why they made a major gift to the Building Dreams Centennial Campaign. A *t*-test of independent samples was conducted for each motivating factor to determine if the amount of the major gift differed by the presence of any of the motivational factors. The only factor that showed a statistical significance was the factor Being Asked, which had a negative impact on the amount of giving. This is of research interest, as all of the respondents to the survey were actually asked to make a major gift to the campaign. The researcher's interpretation of this finding is that, as most of the individuals who made major gifts were met with by university administrators, and



sometimes, campaign volunteers several times before the donor was invited to consider making a campaign gift, many of the respondents so enjoyed the visits and felt part of the campaign organizing that they did not view the solicitation so much as “being asked” but rather as being invited to be part of a special effort they were discussing. They also may have felt that, as they were having conversations with university administrators, it was not so much about being solicited for a gift, but rather it was a dialogue about various university programs and learning how they could be of assistance in moving a particular program forward, or establishing a scholarship fund to benefit worthy students, or whatever the donor found compelling. It would be interesting to conduct further research into this matter by doing qualitative research such as conducting in-depth interviews with the respondents who checked the factor Being Asked and ask them about their giving experience. This may support the rationale provided above, or it may identify totally different reasons as to why their gifts were smaller.

The motivation of Leaving a Legacy at BGSU, while not statistically significant, was very close to significance and, therefore, may imply a practical difference whereby those who were motivated by Leaving a Legacy gave a higher amount than those who were not motivated by this factor. This may speak to a desire to having a fund (or building) of permanence to reflect one’s commitment to the institution or to speak of what one values and finds important in life. However, it also may be that these individuals included a portion of their gift as an estate commitment and therefore interpreted the factor Leaving a Legacy as bequeathing an estate commitment. This would also be an area that would benefit from future study through qualitative research.

A review of all 20 motivational factors from which the respondent could select as many factors as the respondent wished to shows that the factor Give Back to BGSU was the most

frequently selected response, with 134 (74.4%) people choosing this reason for giving. The second most frequently selected response was Leave a Legacy at BGSU, by 80 (44.4%) individuals. Tied for third place were the reasons Identified with a Project and Helping Those With Less, with 74 (41.1%) respondents selecting these motivational factors. Following close behind was the factor Bring About a Desired Impact selected by 71 (39.4%) individuals. The first two of these factors speak to feeling very positive about one's own experience at the institution and wanting to leave something of permanence as a result. In the case of the factor Give Back to BGSU, alumni may be most likely to identify with this response, but it could also be applicable to faculty or staff donors, or parent donors as well. From a practitioner's standpoint, it would be wise to learn if a potential donor had a positive experience with the institution, and if so, use this factor in discussions with the donor prospect. The second factor of Leave a Legacy at BGSU implies knowing that the donor may want to leave something of permanence for which to be remembered at the institution. This could be something physically lasting, such as a building or a garden, or it could be a named endowed fund for a professorship or scholarship that reflects the values of the donor. The factors that tied for third place, Identified with a Project and Helping Those With Less, are different types of motivations. For example, a donor may have selected to give to the entrepreneurship program because the donor is a business owner and saw a need for such a program. With further research, it would be interesting to learn if those who checked Helping Those With Less were donors whose household income and education level was lower. If so, it would further validate the Center on Philanthropy's Understanding Donor Motivations for Giving study (2009), that found that donors whose income and education levels were lower were more likely to give to causes that provide for people's basic needs, and were motivated by "helping the poor help themselves," while those

of higher income and higher educational attainment were more likely to contribute to causes to “make the community better” or to “make the world better” (pp. 4-5).

The least selected factor was Expected in my Social Network with only 3 (1.7%) people choosing that reason. Three factors tied for the second least motivating factor for giving: Pressure from my Friends, Made Good Business Sense, and Want to Limit Funds to Heirs, with 4 (2.2%) individuals selecting each of those factors.

It should not be a surprise that so few individuals chose Expected in my Social Network. Even if that is a factor that is included in the reason(s) a donor may give, it is unlikely that when discussing philanthropic giving, one would identify it as a leading reason for giving. Also, because the major donors to this campaign lived in a wide geographic territory, many of them may not have an active social network that included other major gift donors to BGSU. This rationale would also explain one of the next least motivating factors, Pressure from my Friends. Regarding one of the other factors that tied for second to last, Made Good Business Sense, the small number of donors who selected that factor (4) may indicate that while there are certainly tax-wise ways of giving, most of the donors did not view it as a motivating factor for themselves. It could also mean that the tax-wise ways of giving were either not applicable to their own situation, or were not well explained by either the gift officer or by the donor’s accountant or attorney. The factor Want to Limit Funds to Heirs was the third factor tied for second to last. While many people wish to leave an estate gift to heirs, some very wealthy people may believe that too much inherited wealth could serve as a disincentive for heirs to work, or from a tax standpoint, their financial advisors may encourage them to leave more funds to charity to lessen the tax burden on the estate.

*Discussion of the Impact of Serving on a Voluntary Board and the Amount of Gift*

The third research question asked, “Does serving on a voluntary board at the university impact the amount of gift?” A *t*-test of independent samples was used to examine if participating on a particular board impacts the amount of gift, and ANOVA with a post-hoc Scheffe test was used to examine if the degree of board participation impacts the amount of gift. The results showed that there was a positive relationship between serving on a board and the size of gift, and that those who served on the Board of Trustees or Foundation Board had positive significant differences in the amount of giving in comparison with those who served on the other boards. In addition, a difference was found in the amount of giving when comparing those who participated on any board ( $n=71$ ,  $M=3.04$ ) to those who did not have board experience at BGSU ( $n=107$ ,  $M=1.95$ ). Also, of importance is that those who had multiple board experiences at BGSU gave more than those who had a single board experience, or who had no board experience at BGSU.

This finding is consistent with that of Gaier (2005) who found that, among other variables, board service was likely to influence financial contributions to higher education institutions. It is also consistent with Wang and Graddy’s (2008) research that found that social capital has a positive impact on giving. They found that belonging to associations and being active in an organization increases the amount of giving, and that there is a positive relationship between volunteering and giving. In Panas’ (2005) qualitative research of 50 donors who had made gifts of a million dollars or more, he found that “being a part of ‘the club,’ being associated with prominent men and women who are giving to the same cause” (p. 34) is often cited. Serving on a board at an institution of higher education that one cares about is, indeed, being “part of the club.” Such boards, as is the case at BGSU, usually have an expectation of philanthropic giving, and depending on the leadership of the board, and at what level the board

leadership gives to a fundraising campaign, other board members often follow suit. Panas found that donors who gave at this high level all had a long association with the institution – in some cases for several decades – and had a history of making prior gifts to the institution as well. This closely parallels the BGSU Building Dreams Campaign Survey, where participants indicated that nearly 80% (79.9%) of them had been donors to BGSU for 10 years or longer. Only one respondent (0.6%) indicated having been a donor to BGSU for less than one year.

One of the variables Schervish (1997) found influenced giving was what he termed the concept of “communities of participation.” Like Panas’ findings on giving by association, Schervish states that association through organized clubs or other formal or informal networks, such as boards, that are associated with the institution increases likelihood of giving. In Schervish’s (2005) qualitative study of 130 wealthy donors in 11 different communities throughout the U.S., the study also found associational dynamics of charity, in that the largest amount of giving and volunteering is done in activities with which the donor is directly associated. The responses of those interviewed highlighted a common theme of donors wanting to shape a charitable cause, rather than just support it. Members of voluntary boards get to do just that. Through their counsel, advice, and philanthropic giving, they can shape a cause they care about beyond supporting it financially.

These findings have tremendous value to researchers, practitioners of development and university administrators. Working with boards is a time-consuming process that requires much commitment to the recruitment of board members, the orientation process, and the scheduling and planning of meaningful meetings and follow-up activities. Higher education administrators have numerous demands on their schedules with faculty, budget, and student issues all competing for their attention. Yet, working with a strategically-recruited voluntary board of

advisors can ultimately provide mutually beneficial experiences for the donor / board member as well as the institution that benefits from the thought and caring input of the board member as well as the financial giving the individual is more likely to bestow upon the institution as a result of the board experience. Working with voluntary boards, as seen by results of the present study as well as prior research, demonstrates that it is something administrators should take seriously and something on which they should spend considerable time and energy. While financial wherewithal should certainly not be the only consideration in recruiting a board member, if raising funds for the institution (or college or school unit within the institution) is of importance, then a potential board member's financial capability should be considered in the mix of what makes a good board member. Panas (2006) writes that board members should have "three Ws: work, wealth, and wisdom" (p. 49). He also states that the most important giving constituency at any non-profit institution is its board, and that in addition to the board members' individual gifts, their giving will influence the level of support they receive from foundations, as many foundations consider the level of board member support when determining whether or not to make a grant. As Cornell University's former president, Dr. Frank Rhodes said, alumni are not likely to be persuaded as to the need of a campaign if the board regards it with indifference (Rhodes, 1997, p. 12). Based on his experience of working with a board of trustees for many years, he validates that being involved with a university governing board during a campaign is an experience that most find meaningful as "the process involves shared effort between partners, joint commitment between team members, common interaction between friends" (Rhodes, 1997, p. 12). Such involvement inspires others to give because of the leadership example of the trustees' generosity.

A finding of great interest from the present study was that those individuals who had served on multiple boards at BGSU gave the largest gifts to the campaign. Prior research on multiple board service and its impact on giving was not found by the researcher while conducting the literature review. This finding speaks to the importance of finding meaningful ways to keep prior board members involved once their term of service to an initial board appointment has expired. Ways to keep them involved may be through appointment to another board at the university, or perhaps to a special ad hoc committee or other opportunity for service that keeps them engaged.

#### *Discussion of Motivational Factors and Demographic Variables that Predict Gift Amount*

The fourth and final research question was “Which motivational factors and demographic variables best predict the amount of the gift?” The researcher used forward multiple regression to determine which demographic variables and motivating factors best predict the amount of gift. The variable factors entered into the model included: Income, Leaving a Legacy, Age, Identifying with a Project, and Board Participation. The findings indicated that income accounted for the greatest amount of variance in the amount of giving. Gaier (2005) found that the economic success of an individual impacts the ability to make a gift, so this finding substantiates Gaier’s. This should not be a finding of surprise. If one has the capacity to give large gifts, then one can make larger gifts, providing one has the inclination and desire to do so. While this finding may support the expected result, it is nonetheless important to know, and then in turn, for practitioners to focus their primary development efforts on those whose resources allow them to give the highest gifts. The other significant factors, however, should not be dismissed, as they can work together toward influencing a larger gift to the institution. As aforementioned, those participants in the age category of 70-79 gave at the highest level in this

study, with those in the 60-69 category the second highest donors. Likewise, the factors Leave a Legacy and Identified with a Project were two of the highest ranking factors. Those who served on a board at the institution gave larger gifts than those who did not serve on a board. Through strategically focusing on individuals in the age categories of 60-79, with high net worth who have served on a board at the institution (or inviting them to do so), matching the interest of the donor with an institutional priority (identifying with a project), and letting them know how they can Leave a Legacy through their gift, one can substantially increase the likelihood and level of giving.

#### Recommendations for Further Research

This study gave a great deal of insight and descriptive data regarding what motivated major gift campaign donors at one institution of higher education. While the results of the study answered the four research questions posed, in the course of the study, new potential areas of research that would be beneficial to the field of philanthropic giving to higher education emerged. The following are recommended areas for additional research:

The first recommendation for further research builds upon the current study but would employ qualitative research methodology on a similar subset of major gift donors to a public university fundraising campaign at a mid-size, Midwest university. By employing this type of methodology, the researcher could ask questions in a face-to-face format with follow-up questions which may lead to more insightful analysis and interpretation of giving motivations. Due to the findings in this study regarding the positive correlation between board service and size of gift, employing case studies or another qualitative method would allow for more in-depth research into what specific type of engagement the donor had experienced with the institution,



over what period of time, whether or not a volunteer leadership position had been held if the donor had served on a board, among other questions.

The second recommendation would be to include questions regarding religious affiliation and frequency of religious practice and how that may or may not impact their philanthropic involvement with a public institution and the size of gift. Brooks (2006) found that individuals who professed active involvement with their religious faith were more likely to give to charity than those who did not profess religious adherence (p. 36). Also of interest would be to explore whether or not the major gift donors had experienced alumni or board travel with the institution for a multi-day period of time and how such travel may have impacted their philanthropic involvement. Gaier (2005) found that involvement as an alumnus was a predictor of financially contributing at any level. Travel programs allow for a great deal of social interaction as well as time for discussion regarding the sponsoring institution, so it would be interesting to see if there is a correlation in giving overall and size of gift based upon this type of involvement.

Using a Likert-scale to measure the motivational factors would allow better insight and understanding of the degree that each factor influenced giving, as it would be able to gauge intensity. Another possible way to address this issue would be to ask the respondent to rank order the top five motivations from the list.

#### Limitations

One delimitation of this study was the restriction of only collecting data from one Midwestern state university. By design, this study only examined major gift donors from one Midwestern public higher education institution and from one comprehensive campaign (Bowling Green State University). As such, the generalizability of the study may be limited. The results may be different than those from a small, private institution, from a flagship state university, or

from a higher education institution in a different region of the country. Also, they may differ from an institution that has specialized community outreach services, such as a hospital, where an individual may be motivated to give based on past care one has received.

This study relied in part on self-reporting by donors; reliability of self-reporting may sometimes be questioned, as respondents may misinterpret the question, or may be unaware of his or her subconscious motivations for giving. Another limitation was that individuals completed the survey, but for couples, the gift decision may have been made jointly, and each partner may have had different motivations for giving. As there was only one motivating factor that was statistically significant, with a second being very close, it would be interesting to see if by dropping the minimum level of gift to a lower amount, perhaps \$5,000, if there would be a greater number of statistically significant factors. Rather than using categories of gift amounts, it is suggested that future research use the specific amount.

### Conclusion

The study matters a great deal to current and future higher education practitioners as well as to researchers. With financial and human resources at public higher education institutions increasingly in dwindling supply, it is imperative that resources are used as wisely as possible. As discussed in Chapter 1, the need for a well-educated society has never been greater in order to compete in a global economy. At the same time, due to diminishing state support and the impact of a global recession, public institutions of higher education are receiving less public funding, simultaneous to when students are in greater need of additional support. One of the very few ways to increase funding is through private support. As the literature review indicated, fundraising campaigns in higher education have become increasingly utilized as ways to enhance

giving and increase the number of scholarships awarded, assist with building projects, and other needs of universities.

The findings from the Building Dreams Campaign Survey indicate that the most likely major gift donors to a campaign are those individuals who are between the ages of 70-79, have been engaged in board service on multiple boards with the institution, are people of wealth, and who do not see the discussions leading up to the gift as “being asked,” which has a negative impact on the amount of gift. The male gender was associated with the highest gifts for this study, however, this may be more reflective of generational social norms for the age range most likely to have made the highest gifts during this campaign (ages 70-79), and may likely change over time as women advance professionally and have incomes that are equal or higher to their male counterparts. Of particular note is that those who had multiple board experiences gave the most. These findings should result in university administrators and development professionals carefully scrutinizing who is invited to serve on volunteer boards, making certain that the board experience is a positive one for the volunteers, and upon conclusion of terms of service, looking for ways to further engage the individual.

As non-profits including cultural organizations, social service agencies, religious groups, hospitals, and educational institutions among others seek additional private support, the competition for funds has increased. With government funding decreasing and the population growing, the need for increased private support will continue to grow. Those organizations that do the best job of identifying top-level potential donors and engaging them in meaningful ways are the ones who will have a financial advantage to allow them to carry out their mission.

Future areas of study may include exploring major donors’ religious affiliation and frequency of attendance at religious events to determine if there is a correlation with giving,

whether or not they have children, participation on alumni or board trips and conducting mixed methods research including qualitative research with in-depth interviews conducted with the major donors to further determine nuances regarding their motivations in making major gifts to public higher education campaigns.

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Office of Research Compliance  
309A University Hall  
Bowling Green, OH 43403-0183  
Phone: (419) 372-7716  
Fax: (419) 372-6916  
E-mail: hsrb@bgsu.edu

HSRB MEMBERSHIP  
2009-2010

Amy Morgan, HSRB Chair  
Kinesiology  
372-0596  
amorgan@bgsu.edu

Mary Hare, HSRB Vice Chair  
Psychology  
372-2526  
mlhare@bgsu.edu

D. Wayne Bell, M.D.  
Wood Health Corp.  
353-6225  
speakingdoc@dacor.net

Cheryl Conley  
Alzheimer's Assn., NW Ohio  
419-537-1999  
conleyc@bgsu.edu

L. Fleming Fallon, Jr., M.D.  
Public & Allied Health  
372-8316  
ffallon@bgsu.edu

Rodney Gabel  
Comm. Sciences & Disorders  
372-2515  
rgabel@bgsu.edu

Hillary Harms  
Office of Research Compliance  
372-7716  
hsrb@bgsu.edu

Montana Miller  
Popular Culture  
372-0184  
montanm@bgsu.edu

Jeanne Novak  
Intervention Services  
372-7293  
jnovak@bgsu.edu

Erin Smith  
Psychology  
372-4396  
esmith@bgsu.edu

August 6, 2010

**TO:** Marcia Sloan Latta  
Alumni and Development

**FROM:** Hillary Harms, Ph.D.  
HSRB Administrator

**RE:** Human Subjects Review Board Project No.: H11D016GX4

**TITLE:** *Characteristics and Determinants of Major Gift Donors to BGSU*

The BGSU Human Subjects Review Board (HSRB) has completed its review of your project involving research with human subjects.

Your project has been **approved as submitted**. This approval is effective August 5, 2010 and expires on August 4, 2011.

You are authorized to use human subjects for 12 months, but only in the manner described in your proposal. If you seek to make any changes in your project activities or procedures, those changes must be approved by the HSRB prior to their implementation. Please notify the Board, in writing, (fax: 372-6916 or e-mail: hsrb@bgsu.edu) when you have completed your project. If you have any questions, please contact the Chair of the HSRB or me at 372-7716.

Good luck with your research project. Let me know if this office or the HSRB can be of assistance as your project proceeds

**COMMENTS:**

C: Dr. Patrick Pauken

**RESEARCH CATEGORY:** EXEMPT #4



BGSU Foundation, Inc.  
Office of Alumni & Development  
Mileti Alumni Center  
Bowling Green, OH 43403-0054

March XX, 2009

Name  
Street Address  
City/State/Zip

Dear \_\_\_\_\_ :

We need your help! In the summer of 2002, BGSU embarked on its first-ever major comprehensive fundraising campaign, the Building Dreams Centennial Campaign. As you may be aware, our ambitious goal of \$120 million was surpassed with more than \$146.5 million raised for scholarships, special programs, buildings, and other needs.

In an effort to help our advancement programs and plan for future efforts, we are asking all donors who made commitments of \$25,000 and above to fill out the enclosed survey. It will take about 10 minutes of your time, and will be tremendously helpful to us in offering insights to assess our program. *Your responses will be kept confidential* and will be pooled with all other data and reported in aggregate form only. (Hard copy data will be stored for two years in a locked file accessible only by me. After that time, data files will be destroyed.)

With approval from BGSU, this survey process is being administered by Bentz Whaley Flessner, a national consulting firm that has partnered with BGSU for the past several years. Please know that participation in this survey is completely voluntary. Completion and return of the survey constitute your consent to participate. (BGSU survey policy asks that I inform you that your decision whether or not to participate will not prejudice any future relationships with BGSU and if you decide to participate, you are free to discontinue participation at any time without penalty.)

If you have any questions regarding this study, please contact me at (419) 372-7691 or [mlatta@bgsu.edu](mailto:mlatta@bgsu.edu), or if you have any questions regarding your rights as a research participant, please contact the chair of the BGSU Human Subjects Review Board at (419) 372-7716 or [hrrsb@bgsu.edu](mailto:hrrsb@bgsu.edu).

Many thanks for your generosity to BGSU, and for taking the time to complete this important survey which will certainly be helpful to our advancement efforts. We would appreciate your response by March XX, 2009.

Sincerely,

Marcia Sloan Latta  
Campaign Director

BGSU HSRB - APPROVED FOR USE  
ID # H09Q203S2  
EFFECTIVE 03-06-09  
EXPIRES 03-02-10

Building  
Dreams

THE CENTENNIAL CAMPAIGN FOR  
BOWLING GREEN STATE UNIVERSITY



BGSU Foundation, Inc.  
Office of Alumni & Development  
Mileti Alumni Center  
Bowling Green, OH 43403-0054

March XX, 2009

Name  
Street Address  
City/State/Zip

Dear \_\_\_\_\_ :

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In an effort to help our advancement program and plan for future efforts, we are asking all donors who made commitments of \$25,000 and above to complete a short on-line survey. It will take about 10 minutes of your time, and will be tremendously helpful to us in offering insights to assess our program. *Your responses will be kept confidential* and will be pooled with all other data and reported in aggregate form only. (Hard copy data will be stored for two years in a locked file accessible only by me. After that time, data files will be destroyed.)

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If you have any questions regarding this study, please contact me at (419) 372-7691 or mlatta@bgsu.edu, or if you have any questions regarding your rights as a research participant, please contact the chair of the BGSU Human Subjects Review Board at (419) 372-7716 or hrsb@bgsu.edu.

Many thanks for your generosity to BGSU, and for taking the time to complete this important survey which will certainly be helpful to our advancement efforts. We would appreciate your response by March XX, 2009.

(insert web link here)

Sincerely,

Marcia Sloan Latta  
Campaign Director

Building  
Dreams

THE CENTENNIAL CAMPAIGN FOR  
BOWLING GREEN STATE UNIVERSITY

# Building Dreams

THE CENTENNIAL CAMPAIGN FOR  
BOWLING GREEN STATE UNIVERSITY

## Giving to Bowling Green State University

1) Please indicate your relationship to BGSU (Please check all that apply)

- Alumnus/Alumna
- Friend
- Parent
- Other

2) If an alumnus/alumna, please indicate class year(s). \_\_\_\_\_ ; \_\_\_\_\_

3) To which campaign initiative have you given? (Please check all that apply)

- BG Experience Values Initiative
- Student scholarships
- Faculty support
- Sebo Athletic Center
- Wolfe Center for the Arts
- Stroh Center
- Other

4) What type of gift did you make to BGSU? (Please check all that apply)

- Cash
- Stocks
- Annuity
- Charitable Remainder Trust
- Bequest
- Life insurance
- In-kind

5) Please indicate the magnitude of your campaign pledge

- \$25,000 - \$49,999
- \$50,000 - \$99,999
- \$100,000 - \$249,999
- \$250,000 - \$499,999
- \$500,000 - \$999,999
- \$1 million or over

6) How long have you been a donor to BGSU?

- Less than one year
- 1 to 3 years
- 4 to 6 years
- 7 to 9 years
- 10 to 12 years
- More than 12 years

7) How often do you donate to BGSU?

- Less than once a year
- Annually
- Bi-annually
- Monthly
- Bi-monthly
- Rarely
- Never

### Motivation

8) Where does BGSU currently rank in your philanthropic giving priorities?

- First
- In my top three
- In my top five
- One of many
- BGSU is not among my giving priorities

9) If you have made a gift to BGSU, what motivated you to do so? (Please check all that apply)

- |   |   |
|---|---|
| <input type="checkbox"/> Give back to BGSU            | <input type="checkbox"/> Leave a legacy at BGSU           |
| <input type="checkbox"/> Bring about a desired impact | <input type="checkbox"/> Desire to transform              |
| <input type="checkbox"/> Desire to sponsor innovation | <input type="checkbox"/> Desire to facilitate improvement |
| <input type="checkbox"/> Identified with project      | <input type="checkbox"/> Share good fortune               |
| <input type="checkbox"/> Create value                 | <input type="checkbox"/> Meet critical needs              |
| <input type="checkbox"/> Tax benefits                 | <input type="checkbox"/> Recognition and respect          |
| <input type="checkbox"/> Pressure from my friends     | <input type="checkbox"/> Expected in my social network    |
| <input type="checkbox"/> Made good business sense     | <input type="checkbox"/> Religious beliefs                |
| <input type="checkbox"/> Being asked                  | <input type="checkbox"/> Set an example                   |
| <input type="checkbox"/> Want to limit funds to heirs | <input type="checkbox"/> Helping those with less          |

10) In your decision to make a gift to BGSU, from whom did you seek advice? (Please check all that apply)

- |  |                                     |
|--|-------------------------------------|
| <input type="checkbox"/> Attorney                      | <input type="checkbox"/> Broker     |
| <input type="checkbox"/> Financial advisor             | <input type="checkbox"/> Bank       |
| <input type="checkbox"/> BGSU fundraiser               | <input type="checkbox"/> Accountant |
| <input type="checkbox"/> Peers                         | <input type="checkbox"/> Spouse     |
| <input type="checkbox"/> Others (please specify) _____ | <input type="checkbox"/> No one     |

11) Who associated with BGSU most influenced your decision to make a gift? (Please check all that apply)

- |   |  |
|---|--|
| <input type="checkbox"/> Campaign volunteer           | <input type="checkbox"/> President                                 |
| <input type="checkbox"/> Dean                         | <input type="checkbox"/> Department Chair                          |
| <input type="checkbox"/> Vice President or Provost    | <input type="checkbox"/> Campaign Director/Director of Development |
| <input type="checkbox"/> Development Officer          | <input type="checkbox"/> Faculty member                            |
| <input type="checkbox"/> Athletic Director            | <input type="checkbox"/> Coach                                     |
| <input type="checkbox"/> Other (please specify) _____ |  |

12) I/we would give more to BGSU if the following occurred:  
(Please check all that apply)

- More financially secure
- Better able to determine impact of gift(s)
- More information on giving vehicles
- Not already financially committed to others
- Not already giving donations in estate
- Name would not be made public
- Better financial return on investments
- Others (please specify) \_\_\_\_\_

13) What would motivate you to make subsequent gifts to BGSU? (Please select all that apply)

- Understanding that my gift is an important source of annual operating support
- Knowing how my gift will enhance the quality of a BGSU education
- Knowing my gift can positively influence BGSU's position in university rankings
- Supporting a specific program that I designate
- Being asked by the right person
- Ability to secure a matching gift from my company
- Quality fundraising piece with a strong case for support
- Follow-up about how my gift was used
- More personal, discretionary money
- Other (please specify) \_\_\_\_\_

### Communication and Marketing

14) What level of need do you believe BGSU has for overall private support?

- High
- Moderate
- Limited
- None
- Unsure

15) Which of the following statements best describes BGSU's ability to communicate its rationale for private support?

- I understand the reasons and I give
- I understand the reasons and I give, but they ask too much or too often
- I understand the reasons, but I don't agree and I don't give
- I find the rationale not to be compelling, but I give
- I have never understood the reasons
- I don't believe I have heard or seen the rationale

16) In what area are you most inclined to be responsive when BGSU appeals for your support?

- |  |   |
|--|---|
| <input type="checkbox"/> Operating support   | <input type="checkbox"/> Specific academic programs, departments or schools |
| <input type="checkbox"/> Athletics           | <input type="checkbox"/> Capital expansion of facilities                    |
| <input type="checkbox"/> Permanent endowment | <input type="checkbox"/> Scholarships for students                          |
| <input type="checkbox"/> None of the above   |   |



17) How much did the Campaign's Case for Support influence your decision?

- Strongly influenced
- Influenced
- Somewhat influenced
- Not influenced

18) BGSU provided the information I needed to make a decision on making a donation.

- Strongly agree
- Agree
- Disagree
- Strongly disagree
- Undecided

19) BGSU effectively communicates its need for donations.

- Strongly agree
- Agree
- Disagree
- Strongly disagree
- Undecided

20) My questions about a donation were answered respectfully and completely.

- Strongly agree
- Agree
- Disagree
- Strongly disagree
- Undecided

21) My opinions and ideas are listened to and valued by BGSU.

- Strongly agree
- Agree
- Disagree
- Strongly disagree
- Undecided

22) I am satisfied with the method(s) by which BGSU makes request for donations.

- Strongly agree
- Agree
- Disagree
- Strongly disagree
- Undecided

### Stewardship

23) How satisfied are you with your ability to designate how your donation to BGSU is to be used?

- Very satisfied
- Somewhat satisfied
- Satisfied
- Somewhat dissatisfied
- Dissatisfied
- Undecided

24) How satisfied are you with the information you receive from BGSU regarding the use of your donation?

- Very satisfied
- Somewhat satisfied
- Satisfied
- Somewhat dissatisfied
- Dissatisfied
- Undecided

25) How satisfied are you with the decisions BGSU makes for use of its funds?

- Very satisfied
- Somewhat satisfied
- Satisfied
- Somewhat dissatisfied
- Dissatisfied
- Undecided

26) How satisfied are you that your donations have been put to the uses for which they were given?

- Very satisfied
- Somewhat satisfied
- Satisfied
- Somewhat dissatisfied
- Dissatisfied
- Undecided

27) How satisfied are you with the recognition you receive from BGSU for being a donor?

- Very satisfied
- Somewhat satisfied
- Satisfied
- Somewhat dissatisfied
- Dissatisfied
- Undecided

28) How satisfied are you with the benefits you receive for being a donor to BGSU?

- Very satisfied  
 Somewhat satisfied  
 Satisfied  
 Somewhat dissatisfied  
 Dissatisfied  
 Undecided

29) Overall, how satisfied are you with the relationship between BGSU and yourself as a donor?

- Very satisfied  
 Somewhat satisfied  
 Satisfied  
 Somewhat dissatisfied  
 Dissatisfied  
 Undecided

30) Is BGSU in your estate plan?

- Yes  
 No

### Demographics

31) What is your gender?

- Male  
 Female

32) What year were you born?

\_\_\_\_\_

33) Where do you reside?

City: \_\_\_\_\_  
 State: \_\_\_\_\_

34) What is the range of your annual household income? Please select one.

- |  |  |
|--|--|
| <input type="checkbox"/> \$25,000 - \$49,999   | <input type="checkbox"/> \$250,000 - \$499,999 |
| <input type="checkbox"/> \$50,000 - \$99,999   | <input type="checkbox"/> \$500,000 - \$999,999 |
| <input type="checkbox"/> \$100,000 - \$249,999 | <input type="checkbox"/> \$1 million or more   |

35) Other Comments:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

*Thank you again for taking the time to complete this important survey.*